Military Evaluation (OER & NCOER) Information

Purpose: to provide basic information on military evaluations (IAW AR 623-3 policy) with an emphasis on Senior Rater profiles.

Outline

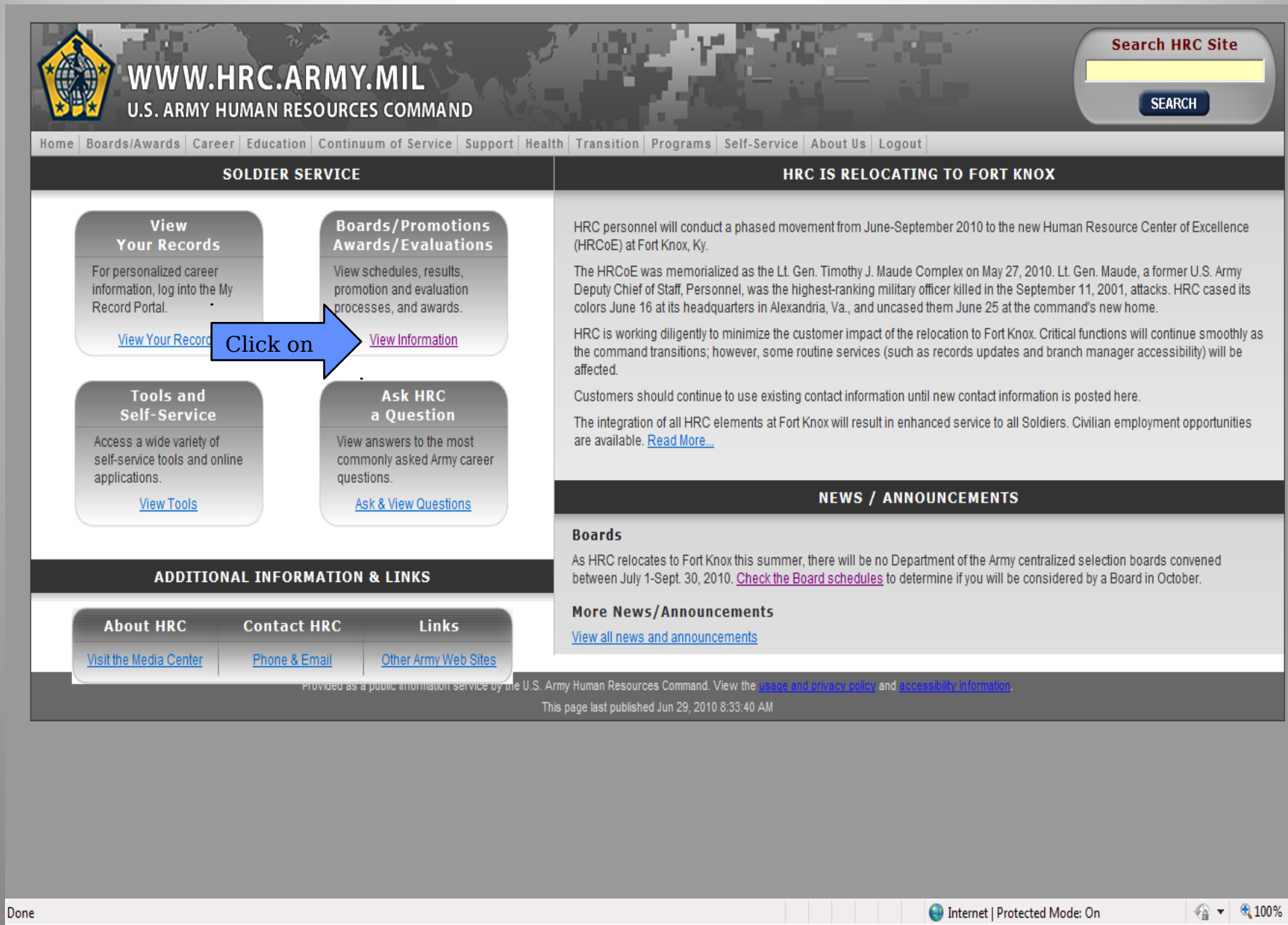
- Evaluation System Information
  - General
  - Process
  - Timeliness
- OER Information (although much applies to NCOER)
  - System
  - Narratives
  - Process
  - Senior Rater (SR) Managed Profile Technique
- NCOER Information
  - System
  - Process
- Back Up Slides

USA HRC Evaluation Branch Goals

- An **officer and NCO Evaluation System** (policy, process, and supporting technology) that for all participants at unit and HQDA level:
  - is consistently healthy (identifying and developing leaders who meet Army needs today and in the future)
  - is sensible / reasonable
  - uses a single Army standard whenever possible
  - is intuitive (or at least self-explanatory)
  - promotes accuracy, transparency, and quick pace in execution activities.
- An **operational posture** that is forward thinking and alert to all environments (internal and external to Army), that implements improvement opportunities, & avoids negative impacts and behaviors.
- **Evaluation knowledge** that is proactively shared and easily accessible, accurate and informative, consistent, and inspiring.

Customers want evaluation processing to be:

- ✓ 100% Accountable (know who has it at all times)
- ✓ 100% Accurate (content accuracy & process excellence
- ✓ Fast and simple (from HRC receipt to OMPF)
- ✓ With a single point of entry for information and access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HRC IS RELOCATING TO FORT KNOX
HRC personnel will conduct a phased movement from June-September 2010 to the new Human Resource Center of Excellence (HRCoE) at Fort Knox, Ky.
The HRCoE was memorialized as the Lt. Gen. Timothy J. Maude Complex on May 27, 2010. Lt. Gen. Maude, a former U.S. Army Deputy Chief of Staff, Personnel, was the highest-ranking military officer killed in the September 11, 2001, attacks. HRC cased its colors June 16 at its headquarters in Alexandria, Va., and uncased them June 25 at the command's new home.
HRC is working diligently to minimize the customer impact of the relocation to Fort Knox. Critical functions will continue smoothly as the command transitions; however, some routine services (such as records updates and branch manager accessibility) will be affected.
Customers should continue to use existing contact information until new contact information is posted here.
The integration of all HRC elements at Fort Knox will result in enhanced service to all Soldiers. Civilian employment opportunities are available. Read More...
NEWS / ANNOUNCEMENTS
Boards
As HRC relocates to Fort Knox this summer, there will be no Department of the Army centralized selection boards convened between July 1-Sept. 30, 2010. Check the Board schedules to determine if you will be considered by a Board in October.
More News/Announcements
View all news and announcements
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This page last published Jun 29, 2010 8:33:40 AM
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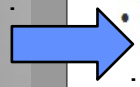

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- Reserve Officer Promotions/Selections
- Active Enlisted Promotions/Selections
- Reserve Enlisted Promotions/Selections
- Army Physical Disability Agency
- Reserve Medical Boards
- Army Review Board Agency
- Awards & Decorations
- Reserve Awards
- Evaluations

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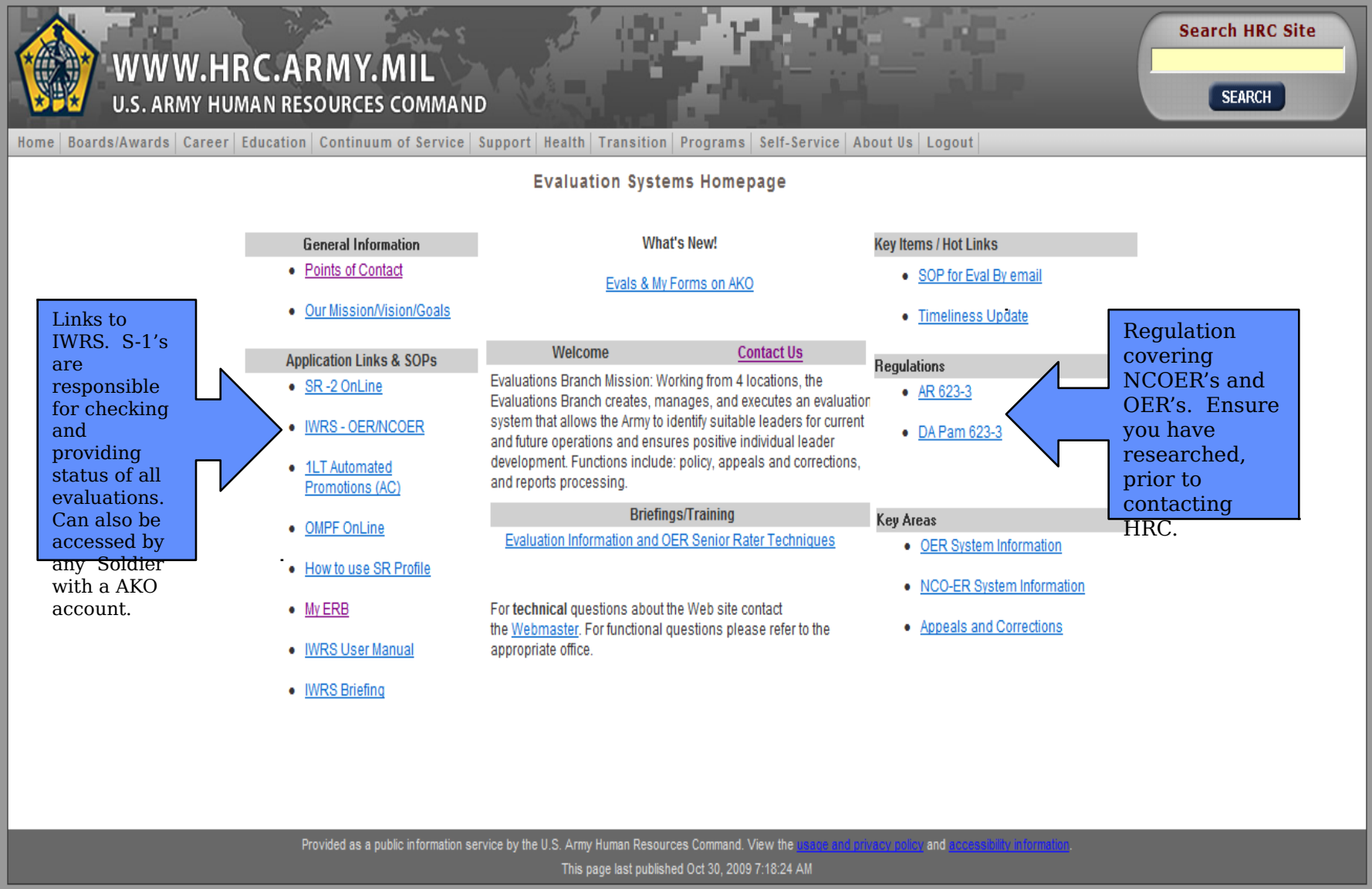
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Evaluation Systems Homepage
General Information
Points of Contact
Our Mission/Vision/Goals
Application Links & SOPs
SR -2 OnLine
IWRS - OER/NCOER
1LT Automated Promotions (AC)
OMPF OnLine
How to use SR Profile
My ERB
IWRS User Manual
IWRS Briefing
What's New!
Evals & My Forms on AKO
Welcome
Contact Us
Evaluations Branch Mission: Working from 4 locations, the Evaluations Branch creates, manages, and executes an evaluation system that allows the Army to identify suitable leaders for current and future operations and ensures positive individual leader development. Functions include: policy, appeals and corrections, and reports processing.
Briefings/Training
Evaluation Information and OER Senior Rater Techniques
For technical questions about the Web site contact the Webmaster. For functional questions please refer to the appropriate office.
Key Items / Hot Links
SOP for Eval By email
Timeliness Update
Regulations
AR 623-3
DA Pam 623-3
Key Areas
OER System Information
NCO-ER System Information
Appeals and Corrections
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This page last published Oct 30, 2009 7:18:24 AM

Links to IWRS. S-1's are responsible for checking and providing status of all evaluations. Can also be accessed by any Soldier with a AKO account.

Regulation covering NCOER's and OER's. Ensure you have researched, prior to contacting HRC.

Done
Internet | Protected Mode: On
100%

Evaluations, Selections and Promotions Division - Points of Contact

Evaluations, Selections and Promotions Division

Office	Web Address and/or Locations	Phone	DSN #
Website	https://www.hrc.army.mil/site/active/tagd/MSD/Msdweb.htm		
Chief	Fort Knox, HRCoE, 2-1-27	(502) 613-8765	983
Secretary	Fort Knox, HRCoE, 2-1-27	(502) 613-8748	983

Promotions Branch

Office	Web Address and/or Locations	Phone	DSN #
Website	https://www.hrc.army.mil/site/active/select/Promo.htm		
Chief, DA Promotions	Fort Knox	(502) 613-8759	983
Officer Promotions e-mail	TAPCMSPO@conus.army.mil	(502) 613-8666	983
Enlisted Promotions-JR Issues	AHRCMSPE1@us.army.mil	(502) 613-9013	983
Enlisted Promotions-STAB	AHRCMSPE2@us.army.mil	(502) 613-8683	983
Enlisted Promotions-SR Issues	AHRCMSPE3@us.army.mil	(502) 613-9014/9015	983
Enlisted Promotions-Other Issues	AHRCMSPE4@us.army.mil		
Special Actions	Hoff II, 5S69, ALX	(703) 325-4111	221
USAR Special Actions	AHRC-MSL-B, STL	(314) 592-0000 x45447	892

Selections Branch

Office	Web Address and/or Locations	Phone	DSN #
Website	https://www.hrc.army.mil/site/active/select/Promo.htm		
Chief	Fort Knox, HRCoE 3-1-050	(502) 613-8808	983
XO	Fort Knox, HRCoE 3-1-050	(502) 613-8804	983
Admin Asst	Fort Knox, HRCoE 3-1-050	(502) 613-8766	983
SGM	Fort Knox, HRCoE 3-1-050	(502) 613-8809	983
Board Support Chief	Fort Knox, HRCoE 3-1-050	(502) 613-8787	983
OPS Chief	Fort Knox, HRCoE 3-1-050	(502) 613-8813	983

Evaluations Branch

Office	Web Address and/or Locations	Phone	DSN #

Information Sources

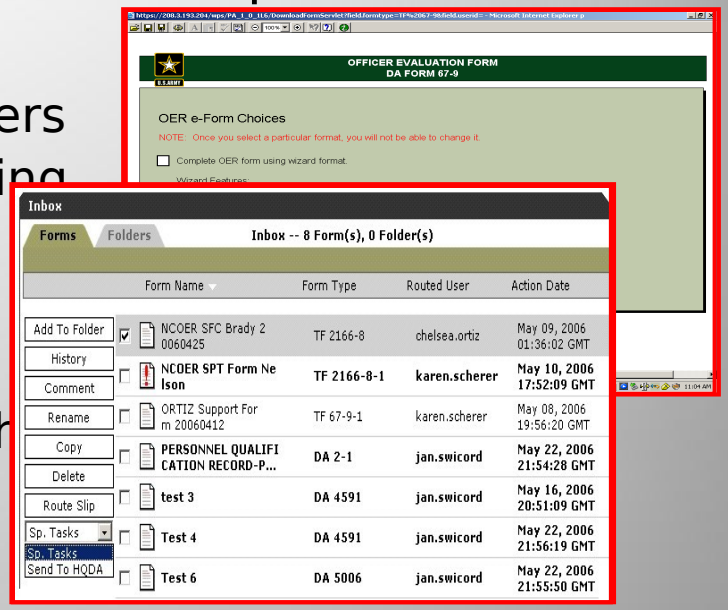
1. **AR 623-3 and DA PAM 623-3**
2. **Forms wizard form formats and AKO forms portal**
3. **Evaluation Systems Office homepage: https://www.hrc.army.mil/site/Active/TAGD/ESPD(formerly_MSD)/msdweb.htm**
4. **Online applications and tools:**
   - **IWRS for all component OER, AC & USAR NCOER reports GKO has ARNG information.**
   - **Online Timeliness Report & OER SR Profile**
5. **Human Resources Command offices:**
   - **Policy: (502) 613-9019 (DSN: 983), tapcmse@conus.army.mil**
   - **Appeals & Corrections: (502) 613-9019 (DSN: 983)**
6. **AKO Forms Portal Assistance: apdfcmp@hqda.army.mil, (703) 428-0545**

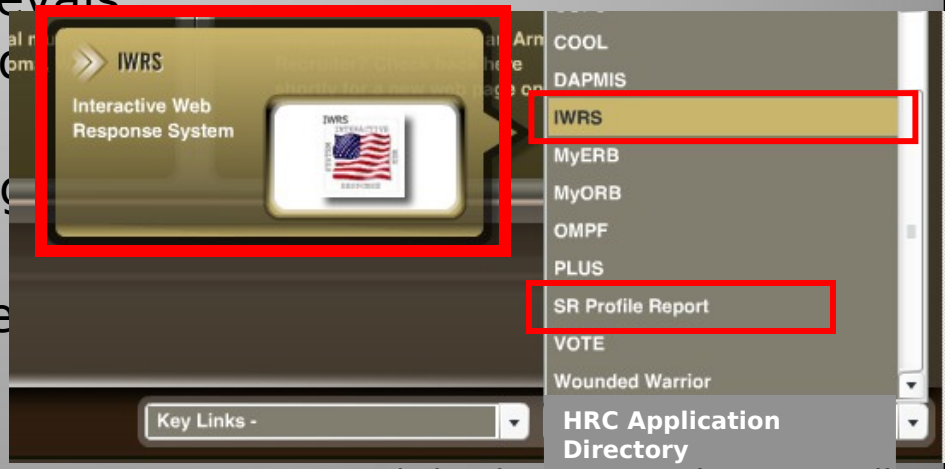
Key Elements for Effective Evaluation Systems

Goal: <u>develop and assess Soldiers</u>; submit reports on time.

Senior Rater's Role – do or ensure:

- Ensure rating schemes are known by Soldiers
- Oversee counseling; participate in counseling
- Use tools & My Forms (red outlines)
- Know current THRU dates of reports on file
- Anticipate and project "next" evals.
  - Current thru date on file plus 12 month or known changes of rater.
  - Complete the record dates for those being considered by a selection.
- Notify rating officials of upcoming evals
- Track rating officials counseling and reports (use My Forms)
- Follow up on receipt and processing at HRC (using tools)
- Take appropriate action with proble rating officials as necessary.





HRC Website: https://www.hrc.army.mil

Evaluation Systems (Facts)

- Function of the OER & NCO-ER is to identify your best (AR 623-3)

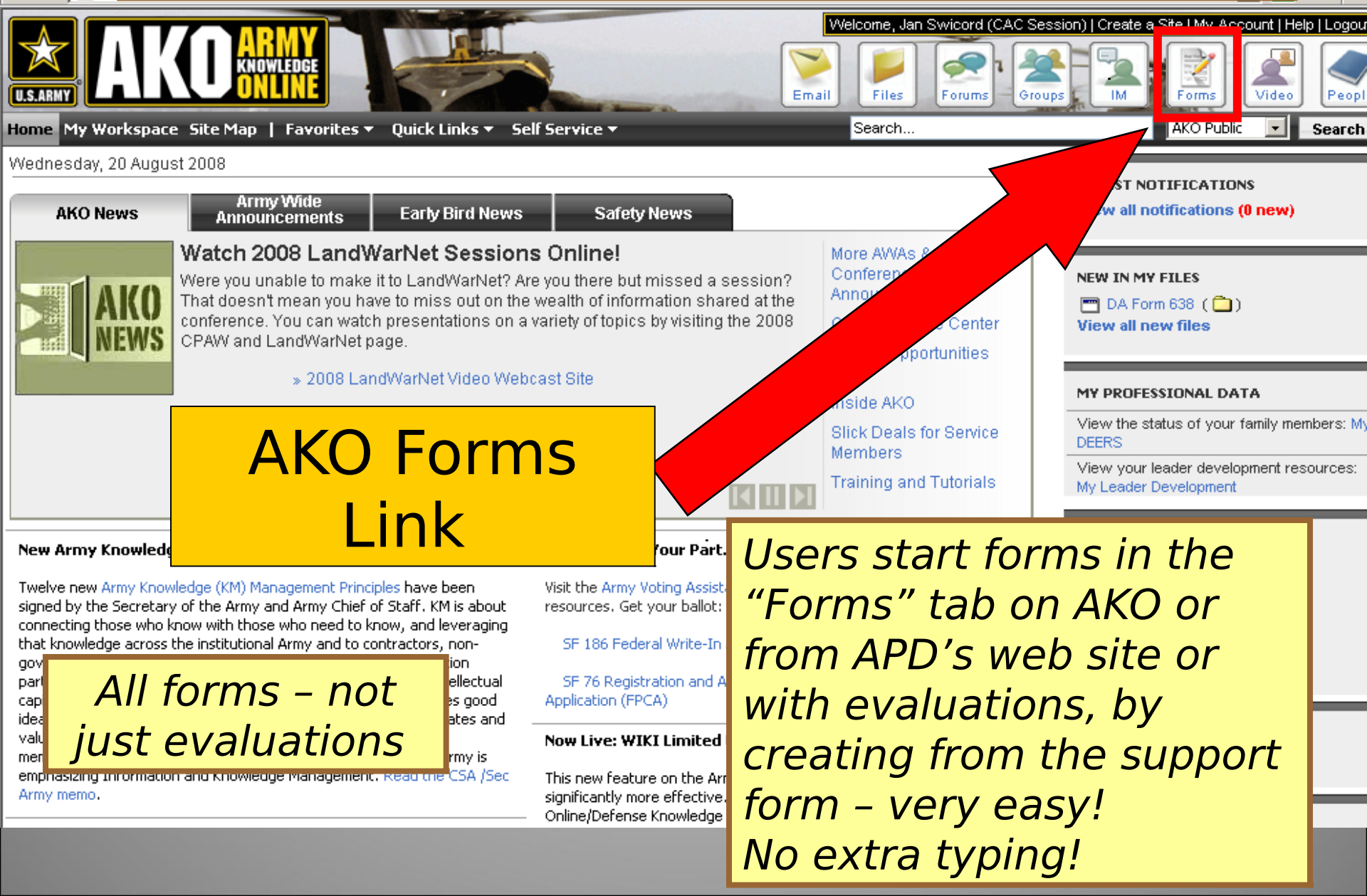
- Both OER and NCO-ER are assessment tools. OER:
  - A forced distribution system (All Services have one)
  - SR top box restricted to <50% (CW3, CW4, MAJ, LTC, COL, BG)
  - SR narrative focuses on quantifiable performance and potential

- Promotion selection system is based on Army requirements
  - Use the top box to identify your best officers and quantified narratives
  - Cannot predict selection board results on ACOM or COM labels (Boards use the **Whole File Concept**)
  - Based on a series of reports (Boards use the **Whole File Concept**)

- Commander is overall care-taker of all personnel systems

- Counseling is key.

AKO Forms Location: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Welcome, Jan Swicord (CAC Session) | Create a Site | My Account | Help | Logout
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Forums
Groups
IM
Forms
Video
Home
My Workspace
Site Map
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Quick Links
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Watch 2008 LandWarNet Sessions Online!
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NEW IN MY FILES
DA Form 638 ( )
View all new files
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View the status of your family members: My DEERS
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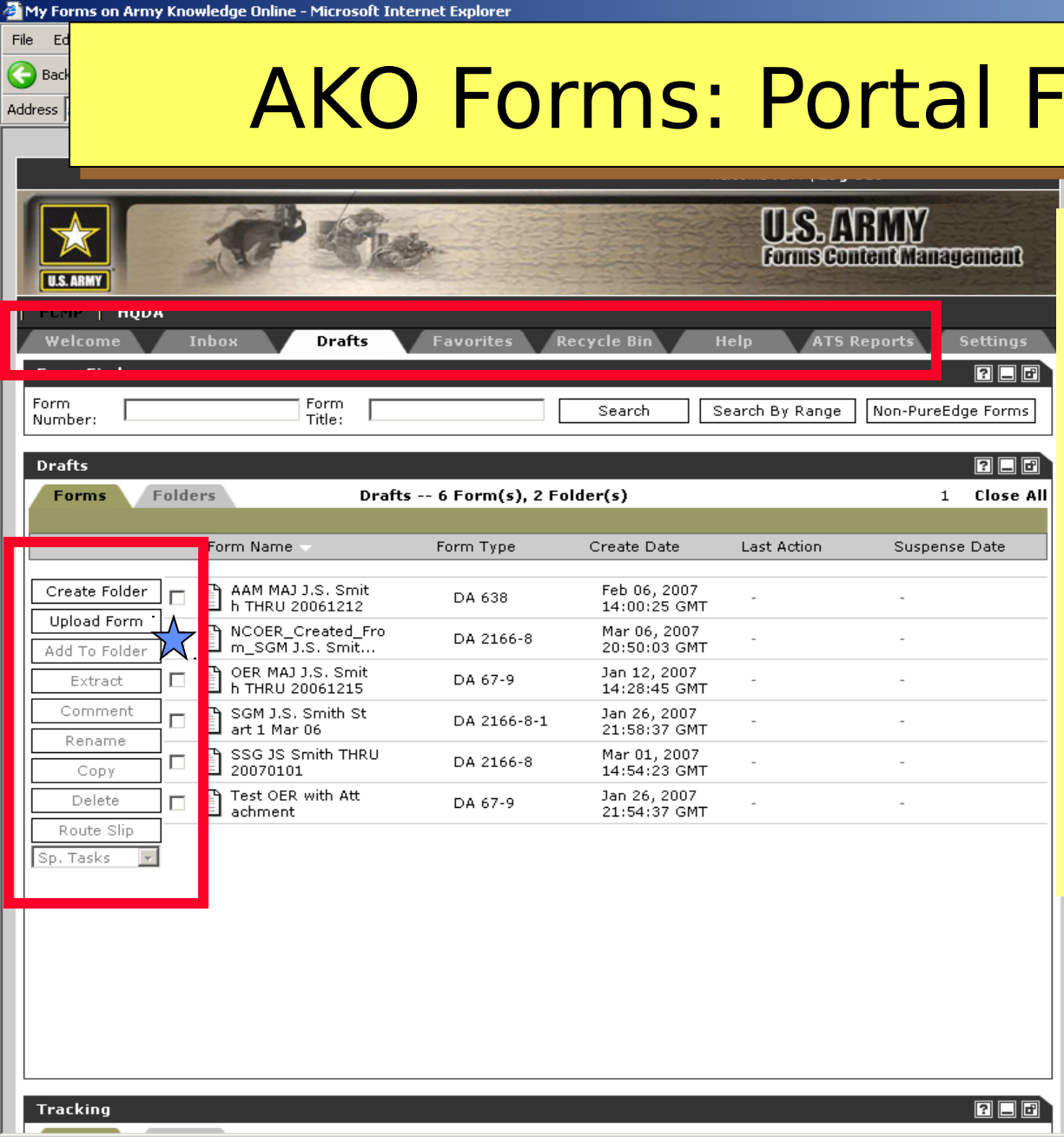
Twelve new Army Knowledge (KM) Management Principles have been signed by the Secretary of the Army and Army Chief of Staff. KM is about connecting those who know with those who need to know, and leveraging that knowledge across the institutional Army and to contractors, non-
Visit the Army Voting Assist resources. Get your ballot:
SF 186 Federal Write-In
SF 76 Registration and A Application (FPCA)
Now Live: WIKI Limited
This new feature on the Ar significantly more effective. Online/Defense Knowledge

AKO Forms Link

All forms – not just evaluations

Users start forms in the "Forms" tab on AKO or from APD's web site or with evaluations, by creating from the support form – very easy!
No extra typing!

AKO Forms: Portal Functions

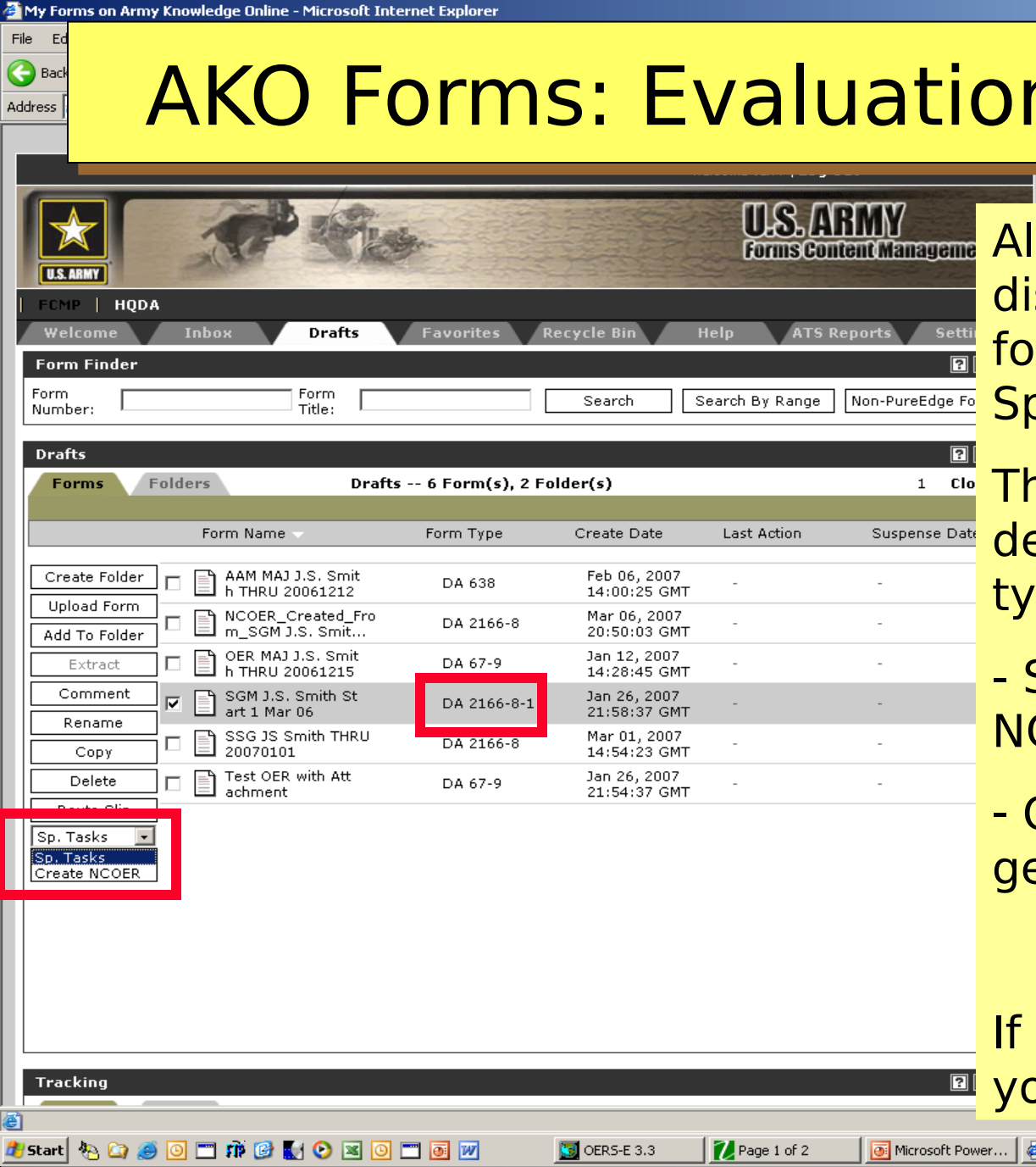


There are different tabs across the top:

A variety of functions that are executed with a check in the appropriate form box:

Learn these / use these

AKO Forms: Evaluation Functions



All the functions previously discussed ARE available for evaluations plus … Special Tasks (Sp Tasks)

This block activates depending on the form type:

- Support forms get Create NCOER or Create OER.

- OER & NCOER get (or will get) SEND TO HQDA.

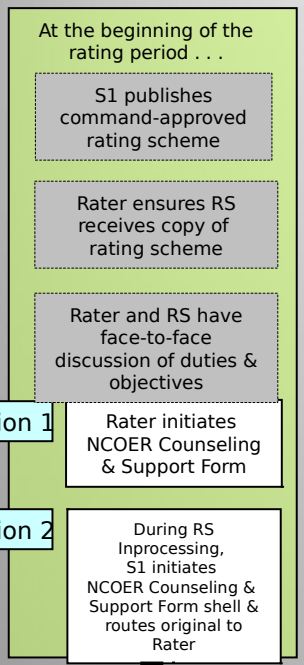
If you lose your form type you don't get these tasks..

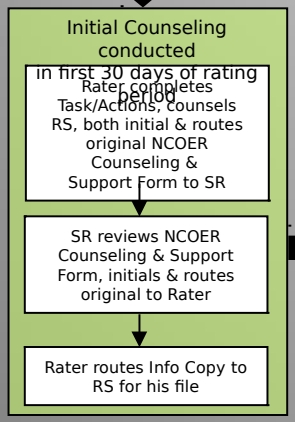
AKO My Forms Portal
Evaluations Business Process - NCOs

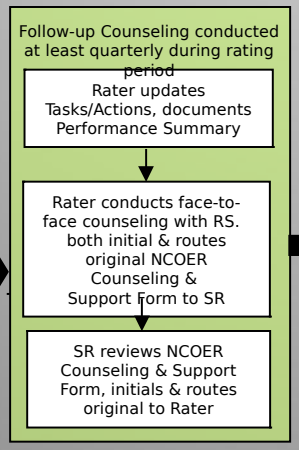
LEGEND

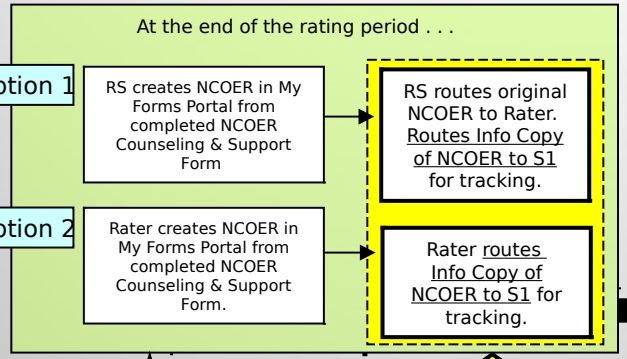
RS Rated Soldier
SR Senior Rater
REV Reviewer

Action in My Forms Portal
Action offline

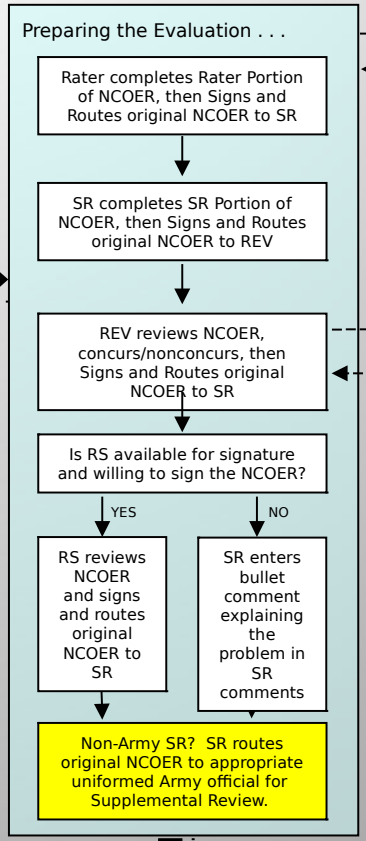

At the beginning of the rating period . . .
S1 publishes command-approved rating scheme
Rater ensures RS receives copy of rating scheme
Rater and RS have face-to-face discussion of duties & objectives
Option 1
Rater initiates NCOER Counseling & Support Form
Option 2
During RS Inprocessing, S1 initiates NCOER Counseling & Support Form shell & routes original to Rater

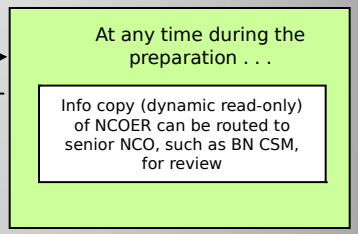

Initial Counseling conducted in first 30 days of rating period
Rater completes Task/Actions, counsels RS, both initial & routes original NCOER Counseling & Support Form to SR
SR reviews NCOER Counseling & Support Form, initials & routes original to Rater
Rater routes Info Copy to RS for his file

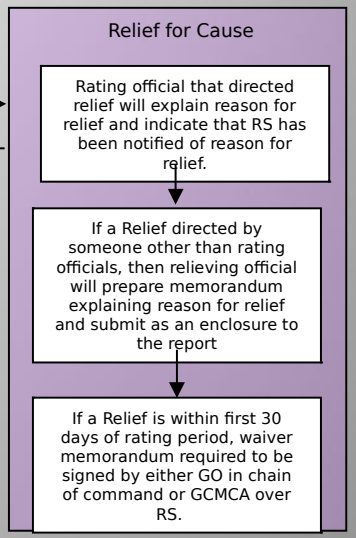

Follow-up Counseling conducted at least quarterly during rating period
Rater updates Tasks/Actions, documents Performance Summary
Rater conducts face-to-face counseling with RS. both initial & routes original NCOER Counseling & Support Form to SR
SR reviews NCOER Counseling & Support Form, initials & routes original to Rater

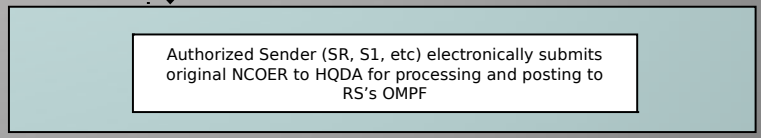

At the end of the rating period . . .
Option 1
RS creates NCOER in My Forms Portal from completed NCOER Counseling & Support Form
RS routes original NCOER to Rater. Routes Info Copy of NCOER to S1 for tracking.
Option 2
Rater creates NCOER in My Forms Portal from completed NCOER Counseling & Support Form.
Rater routes Info Copy of NCOER to S1 for tracking.

NOTE: This step ensures S1 has visibility on NCOER in the Tracking Portlet throughout the NCOER preparation phase


Preparing the Evaluation . . .
Rater completes Rater Portion of NCOER, then Signs and Routes original NCOER to SR
SR completes SR Portion of NCOER, then Signs and Routes original NCOER to REV
REV reviews NCOER, concurs/nonconcurs, then Signs and Routes original NCOER to SR
Is RS available for signature and willing to sign the NCOER?
YES
NO
RS reviews NCOER and signs and routes original NCOER to SR
SR enters bullet comment explaining the problem in SR comments
Non-Army SR? SR routes original NCOER to appropriate uniformed Army official for Supplemental Review.


At any time during the preparation . . .
Info copy (dynamic read-only) of NCOER can be routed to senior NCO, such as BN CSM, for review


Relief for Cause
Rating official that directed relief will explain reason for relief and indicate that RS has been notified of reason for relief.
If a Relief directed by someone other than rating officials, then relieving official will prepare memorandum explaining reason for relief and submit as an enclosure to the report
If a Relief is within first 30 days of rating period, waiver memorandum required to be signed by either GO in chain of command or GCMCA over RS.



S1 tracks NCOER status using Tracking Portlet in AKO My Forms Portal.

The Eval Process from Unit to OMPF

Soldier & unit rating official s

NCOER & OER

My Forms Sender

To HRC

Seen in **My Forms** Tracking

My Forms at HQDA (HRC) level

Date 1: Unit sends To HRC

1

Date 2: HRC acts to either accept or return for correction & re-submission

Seen in **Interactive Web Response System (IWRS) or in Online Senior Rater Profile**

2

Date 3: Eval info is visible to users as having been received (date 2)

HQDA level Processing System

Date 2: HRC act of acceptance becomes date of receipt.

Date 4: HRC completes review of eval (and labeling as needed) and places in OMPF.

3

Seen in **OMPF Online**

Individual Official Military Personnel Files (OMPF)

My Board File (MBF)

Seen in **MBF Online**

THRU Date

In final stage of processing THRU date is sent to the TAPDB-A/R/G which update emilpo, ITTRS, ORB, etc.

#1 Goal: Date 1 (date unit sent) equals Date 2 (date of receipt). Interim goal: keep gap no more than 48 hours.

#2 Goal: Date 3 (date visible in IWRS) no more than 2 days

#3 Goal: Evals make OMPF/board files before near term boards.

How & Where to Submit Evaluations

- **After 1 Apr 08 all evaluations must be submitted to HQDA using AKO Form. This process requires digital signatures.**

- Deployed units and rating officials will submit electronically by My Forms when possible but if necessary may use other submission options, without special approval.

- HRC can grant exemptions, upon request under special circumstances, to ink sign documents which are then mailed to HRC:

  - ❖ OER & NCOER (with exception of ARNG NCOER) are mailed to: U.S. Army Human Resources Command, 1600 Spearhead Division Avenue DEPT #470, Fort Knox, KY 40122-5407

  - ❖ ARNG NCOER – No change. Continue to mail to State/Territory POC

- Older version forms cannot be submitted electronically in AKO Forms. HRC will accepted digitally signed, XFDL attachments by email; however, this method will be stopped in the very near future. Rating officials should create a new OER, using the latest versions.

What Units & Senior Raters Can Do at Execution Time

- ❑ Use the latest form versions – creating an evaluation from a support form in My Forms is a one step process, automatically copies information, and always ends up on the most recent form version.

  → See training: Form Versions & Why to Use Them.

- ❑ Use the form wizard to enter all content to an OER or NCOER; avoid entering data in View Form

  → Answer rating official questions within the form wizard and avoid most policy & form errors.

- ❑ Don't leave blank data fields where information is needed or requested

  → Confirm evaluation is at HRC by using IWRS.

- ❑ Submit with a small buffer of time prior to 90 day limit or "received no later than date" for selection boards.

  → Regularly check AKO email for "Reject" messages & check My Forms INBOX tab for returned evals.

- ❑ Ensure evaluation sender knows how the "return policy" works.

- ❑ Follow up on every submitted rep
  using IWRS

  → See next slide.

- ❑ Avoid the common errors

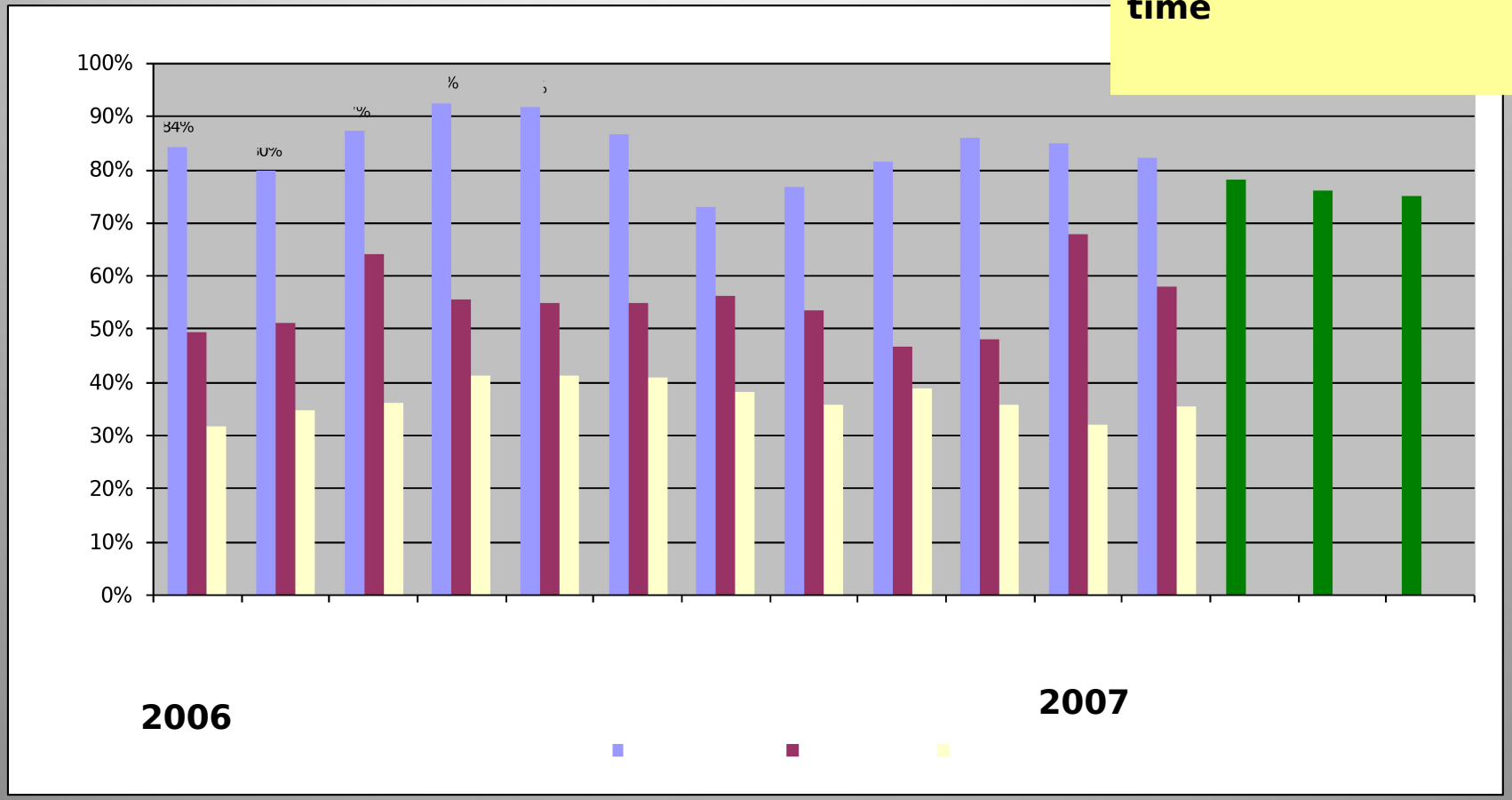
Common Errors on Digitally Signed Evals

- Signing more than 14 days prior to the THRU date
- Sending to HQDA before the THRU date
- Missing YES or NO after HT/WT on OER
- Missing numeric score from APFT on NCOER with “needs improvement” box checks for Physical Fitness
- Functional category errors on OER:
  - missing from Part Vd and VIId for all CPT (except JAG, Chaplain, AMEDD)
  - using Career Field (OPFC, ISCF, etc.) instead of Functional Category groupings (MFE, OS, FS)
  - using them for LT, MAJ or LTC reports (not allowed any more)
- Missing basic administrative information such as UIC, senior rater telephone number, rating official rank
- APFT date not in YYYYMMDD format or not within 12 months of THRU date
- Missing # of officers senior rated
- Missing YES/NO on whether 67-9-1 was received

Why an Interest in Eval Timeliness Rates

Purpose: Reflect how units submit OER for specific months, based on date of receipt at HQDA.

Goal: 95% or greater received at HQDA on time



Goal: 95% or greater received at HQDA on time
On Time (before 22 May 07): Received within 90 days (RA/NG) & 120 days (USAR)
On Time (after 22 May 07):Received within 90 days

Senior Rater Evaluation Timeliness Report

FOR USE OF THIS FORM SEE AR 623-3; PROPONENT AGENCY IS ACofS, G-1

NAME:	SSN:	RANK:	CREATED DATE:
JONES, CARLOS W.	888888888	BG	20060201

RO Rank	# Reports Submitted	# Reports On Time	% Reports On Time
MG	0	0	0
BG	0	0	0
COL	200	200	100%
LTC	400	200	50%
MAJ	50	47	94%
CPT	100	10	10%
1LT	100	90	90%
2LT	100	50	50%
CW5	0	0	0
CW4	0	0	0
CW3	0	0	0
CW2	0	0	0
WO1	0	0	0
Total for OER	950	597	62%
SGM	Tbd	Tbd	Tbd
MSG	Tbd	Tbd	Tbd
SFC	Tbd	Tbd	Tbd
SSG	Tbd	Tbd	Tbd
SGT	Tbd	Tbd	Tbd
Total for NCOER	TBD	TBD	TBD
Total for Evals	950	597	62%

DA Form 67-9-2A, 15 May 2006

CREATE EXCEL SPREADSHEET

Notes:

1. On-time calculations for OER & NCOER are based on reports being received at HQDA within 90 days after THRU date, regardless of component.

2.Track OER received after 1 Jun 07 and NCOER received after 1 May 08. ARNG NCOER are kept at State level.

3. Senior rater can view details by selecting a rank. HR Managers can see details in IWRS reports.

4. Will be reset to track only OER & NCOER (with ARNG NCOER exceptions) received on and after 1 Oct 08.

FOR OFFICIAL USE ONLY

Senior Rater Evaluation Timeliness Report

FOR USE OF THIS FORM SEE AR 623-3; PROPONENT AGENCY IS ACofS, G-1

NAME:	SSN:	RANK:	CREATED DATE:
JONES, CARLOS W.	888888888	BG	20060201

Late Reports For This Senior Rater and This Rank

RO Rank	# Reports Submitted	# Reports On Time	Reports Late	% Reports On Time
MAJ	50	47	3	94%

Rank	RO Name	Report Thru Date	Date at HQDA	1-30 days late	31-60 days late	61-90 days late	over 90 days	Current Status
MAJ	Ortiz, Renee	20050101	20050501		x			completed
MAJ	Byers, Sam	20041003	20051003				x	complete
MAJ	Green, Tobias	20030101	20050202				x	completed
Total for this SR	**-**	**-**	**-**	**0**	**1**	**0**	**2**	

Details for late reports shown as part of the Senior Rater Evaluation Timeliness Report

Specifics for the late Major's reports.

OER

OER (Goals)

- Provide selection boards and personnel managers adequate information to make their decisions.

- Allow for field impact on selection of future leaders.
  - Opportunity to advance the “Best”
  - Establish Senior Rater Accountability
  - Confidence that others cannot inflate
  - Narratives focus on Quantitative Performance & Potential

- Enhance Leader Development
  - Focus on Officer Development at Company Grade Level
  - Basis in Army Values, Doctrine & Leadership
  - Emphasis on Counseling
  - Link with OPMS

- Link Performance to Mission

OER System Update

- Board feedback continues to be extremely positive
- Issues remain:
  - Developmental Counseling is Critical
  - Concern with No SR box checks for CO Grade officers
  - Concern over fear of Center of Mass; dissipating based on:
    - Board Results
    - Field feedback from ARI, HRC, IG
  - Senior raters need to develop a “Rating Philosophy” and consider communicating it to rated officers.
- OER’s must be at HRC within 90 days from the thru date.

General Observations: What's Important to Board Members?

- Senior Rater Narrative
- Senior Rater Label
- Duty Description

Senior Rater “Rating Philosophy”

- **Mission: Identify your best.**
- **Develop “Rating Philosophy”** and **consider communicating it to rated officers.**
- **Counseling – ensure counseling is accomplished.**
- **Decide how to assess (particularly) ACOM’s based on performance and potential (not position).**
- **Write well – quantify and qualify in narrative; correspond comments with box check as the system allows and if box check is used. If not, use the narrative to paint the picture.**
- **Plan ahead, think series of reports** (number of times you will senior rate an officer); **use ACOMs sparingly.**

What Selection Board Members have to say about narratives . . .

- “Given that the senior rater ratings are now masked for captains, it is imperative that raters and senior raters use clear, quantifiable descriptions in their comments for both in and above the zone and below the zone selections.”

- “The current OER system works, especially the senior rater profile. Still, the Army must encourage, or impose, discipline on senior rater narratives. We saw an emerging trend where senior raters attempt to circumvent the strict requirements for an ACOM block check through unsubstantiated quantitative statements in COM narratives, and vice-versa. Inflated narratives could dilute the clear message of superior performance conveyed by an ACOM report in the future.”

- “Senior raters invariably have the most influence in how the board judges an individual officer’s performance. Those senior raters who were clear in identifying not only those officers with great potential and performance, but also, substandard performance or officers possessing limited potential and poor performance of duty greatly enhanced the selection process.”

Recent Board Trends - OER

- The best rater and senior rater narratives:
  - ✓ Are short; tell a simple story about the quality of officer being evaluated; focus on potential 3-5 years out (promotions, command, school, & assignments.)
  - ✓Quantify officer's value relative to peers and do so in concert with senior rater box check. Critical for "no box check" OERs.
- Many OER narratives are internally inconsistent:
  - ✓ Quantifying (e.g. "top 2% of my captains") with a small population.
  - ✓ Stating "the best ever"; having 10 in the population, 50 in the profile and a COM label.
- Some phrases and clichés are counterproductive or overused. Examples:
  - ✓ Stellar, hit the ground running.
  - ✓ Consummate, unlimited potential.
- Officers are missing photographs.
- Not all officers are reviewing their files (should use "My

Rater Narrative

Focus on specific, quantifiable performance –

- *What an officer did and how well*
- *Quantify and Qualify Performance and Potential*

- The rater is the first individual to write a narrative on the reverse side of an OER.
- Narrative should explain what the rated officer did and how well he/she did it.
- A laundry list of superlatives is not helpful to selection boards – more is not necessarily better.
- Selection board members do use the rater's narrative in their file deliberations; more intensely when they are looking for in-depth information about a rated officer's performance and potential.
- When there is no senior rater (due normally to lack of rating official qualifications) the rater's narrative is the one which provides the input on both performance and potential.
- Block Vc.
  - Must include specific comments concerning rated officer potential
  - Emphasize potential for the near term (next 3-5 years: command, assignment, school and promotion)
- Block Vd. – Ensure that you list any skill sets or professional qualifications that might be useful to future functional designation boards.

Senior Rater Narrative

Should quantify and qualify the passion (or lack thereof) that senior rater has for rated officer's performance and potential.

- Selection boards should understand what input the Senior Rater is providing without having to guess.
- There are no "magic" or "buzz" words to convey Senior Rater intent.
- Focus on potential (3 to 5 years; command, assignment, schooling and promotion).
- Cannot mention Box Check in the narrative (i.e., "ACOM Officer", "If my profile allowed, I would rate this officer higher.")
- Avoid Disconnect with Box Check
  - Example: Large population, COM Box Check, but Exclusive Narrative
  - Exceptions: Immature profiles, Back to Back reports
- Be careful with your narrative – ***don't say the same thing for all your people (Boards can easily detect repeated verbiage)***

Senior Rating - Consistency

Recommendations:

• **Senior raters need to amplify their Potential box checks by using the narrative to clearly send the appropriate message to selection boards**. The following classification of types of narratives may serve as a guide and assist in sending a clear message:

- **Exclusive narratives**. Those which clearly describe superior performance/potential above that of the vast majority, associated with early promotion and are restrictive in nature (e.g. top 1%, 3%, 5%, etc. of all officers, the best among a select grade or group, promote below the zone).

Should only be used:

- **for the best ACOM reports within a mature profile**
- **for COM reports that follow an ACOM for same rated officer**
- **with discretion, for the very best officers with COM reports in small population/immature profile situations**

- **Strong narratives**. Those which describe significant performance accomplishments and enthusiastically recommend promotion, assignment to key duty positions linked to upward mobility and appropriate military schooling (e.g. among the best, easily in the top third of the officer corps, definitely promote this officer, below the zone potential, one of my best officers).

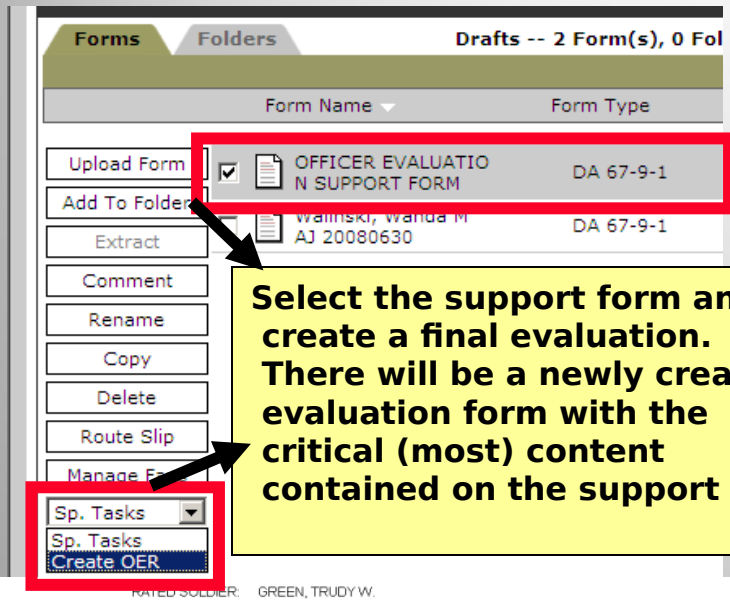
Should be used:

- **for ACOM reports**
- **for the very best officers receiving COM reports**

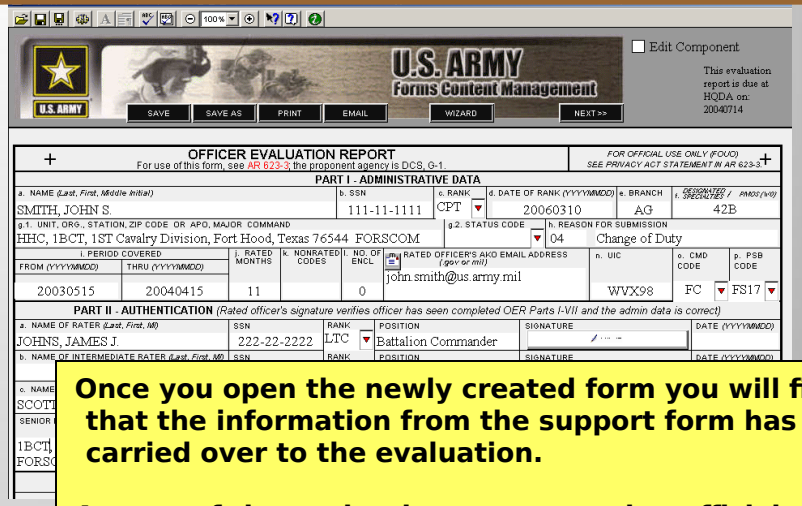
Senior Rater Bottom Line

- **Understand “How the System Works”**
- **Make The Hard Calls**
- **Be Fair, Open, Communicate Your Philosophy, and <u>Counsel</u>**

Creating an OER from an OER support form.

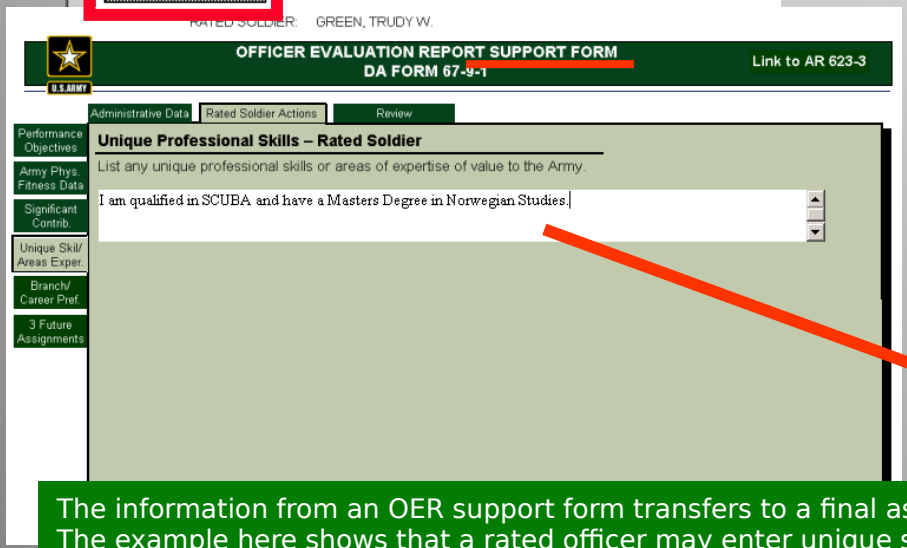


Select the support form and create a final evaluation. There will be a newly created evaluation form with the critical (most) content contained on the support form.

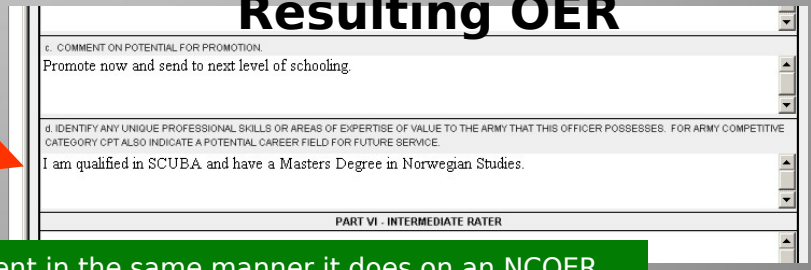


Once you open the newly created form you will find that the information from the support form has carried over to the evaluation.

As part of the evaluation process rating officials complete their portions of the form wizard to ensure the information is still accurate and complete. At the end of their role they digitally sign the report and route through/to next users.

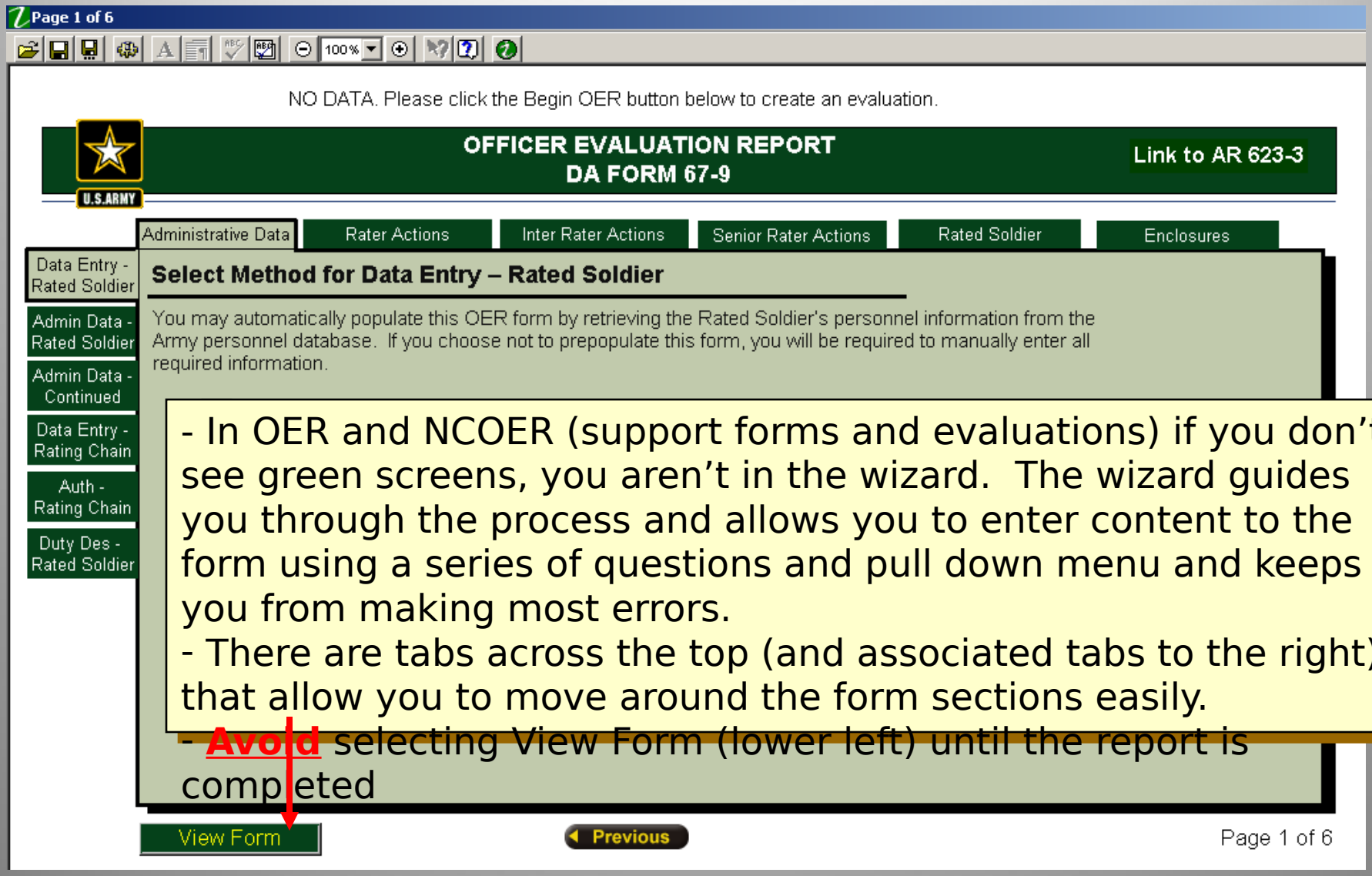

RATED SOLDIER: GREEN, TRUDY W.
OFFICER EVALUATION REPORT SUPPORT FORM
DA FORM 67-9-1
Link to AR 623-3
Administrative Data
Rated Soldier Actions
Review
Performance Objectives
Army Phys. Fitness Data
Significant Contrib.
Unique Skil/ Areas Exper.
Branch/ Career Pref.
3 Future Assignments
Unique Professional Skills – Rated Soldier
List any unique professional skills or areas of expertise of value to the Army.
I am qualified in SCUBA and have a Masters Degree in Norwegian Studies.

Resulting OER


c. COMMENT ON POTENTIAL FOR PROMOTION.
Promote now and send to next level of schooling.
d. IDENTIFY ANY UNIQUE PROFESSIONAL SKILLS OR AREAS OF EXPERTISE OF VALUE TO THE ARMY THAT THIS OFFICER POSSESSES. FOR ARMY COMPETITIVE CATEGORY CPT ALSO INDICATE A POTENTIAL CAREER FIELD FOR FUTURE SERVICE.
I am qualified in SCUBA and have a Masters Degree in Norwegian Studies.
PART VI - INTERMEDIATE RATER

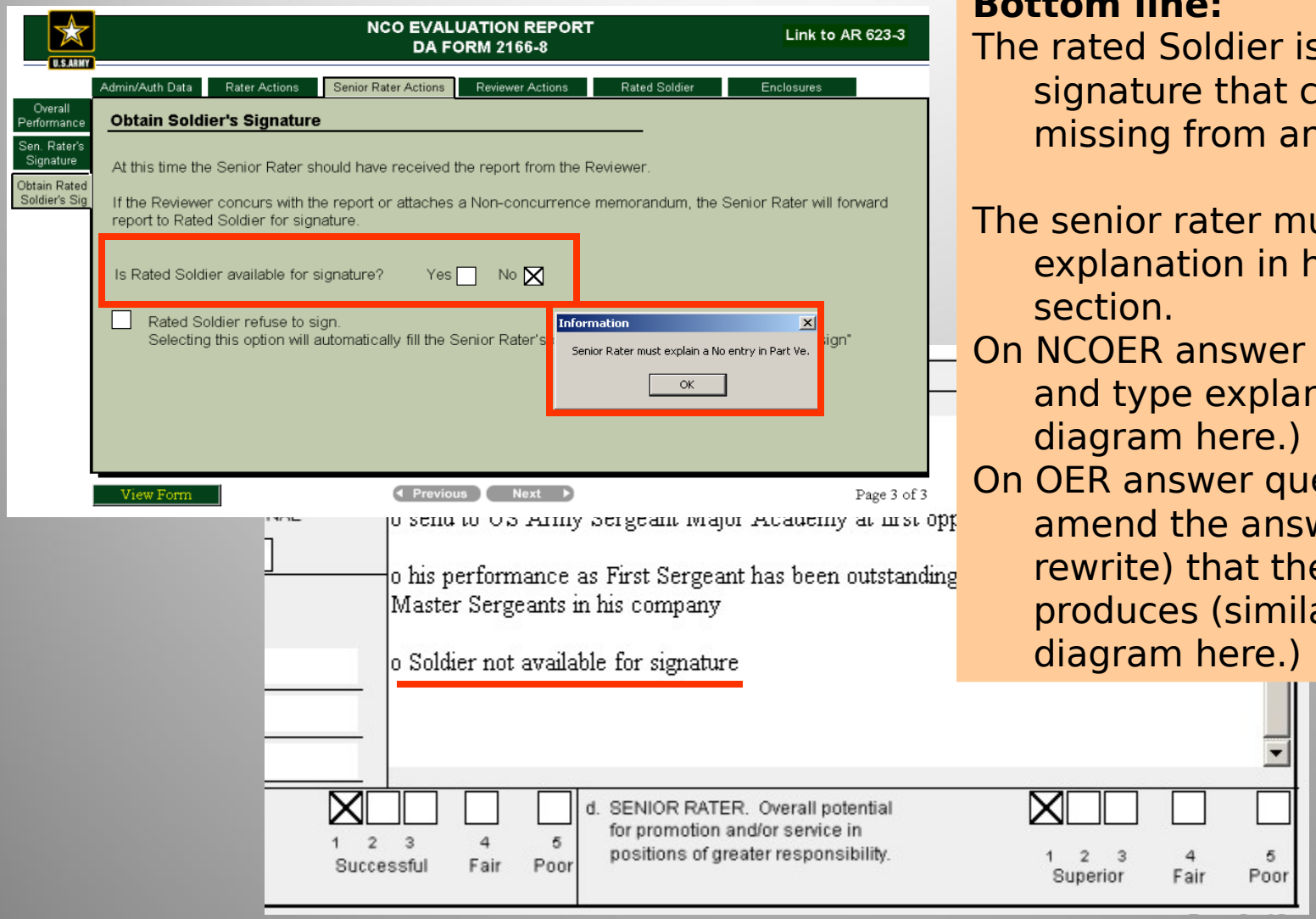
The information from an OER support form transfers to a final assessment in the same manner it does on an NCOER. The example here shows that a rated officer may enter unique skills onto the support form and it transfers to appropriate sections on the OER. The rating official responsible the final evaluation retain the option to accept and change any thing prior to completing and signing their input.

This is an evaluation wizard form …


Page 1 of 6
100%
NO DATA. Please click the Begin OER button below to create an evaluation.
U.S.ARMY
OFFICER EVALUATION REPORT
DA FORM 67-9
Link to AR 623-3
Administrative Data
Rater Actions
Inter Rater Actions
Senior Rater Actions
Rated Soldier
Enclosures
Data Entry - Rated Soldier
Admin Data - Rated Soldier
Admin Data - Continued
Data Entry - Rating Chain
Auth - Rating Chain
Duty Des - Rated Soldier
Select Method for Data Entry – Rated Soldier
You may automatically populate this OER form by retrieving the Rated Soldier's personnel information from the Army personnel database. If you choose not to prepopulate this form, you will be required to manually enter all required information.
View Form
Previous
Page 1 of 6

- In OER and NCOER (support forms and evaluations) if you don't see green screens, you aren't in the wizard. The wizard guides you through the process and allows you to enter content to the form using a series of questions and pull down menu and keeps you from making most errors.
- There are tabs across the top (and associated tabs to the right) that allow you to move around the form sections easily.
- **Avoid** selecting View Form (lower left) until the report is completed

Use the Wizard: Sample here


NCO EVALUATION REPORT
DA FORM 2166-8
Link to AR 623-3
Admin/Auth Data
Rater Actions
Senior Rater Actions
Reviewer Actions
Rated Soldier
Enclosures
Overall Performance
Sen. Rater's Signature
Obtain Rated Soldier's Sig
Obtain Soldier's Signature
At this time the Senior Rater should have received the report from the Reviewer.
If the Reviewer concurs with the report or attaches a Non-concurrence memorandum, the Senior Rater will forward report to Rated Soldier for signature.
Is Rated Soldier available for signature? Yes No
Rated Soldier refuse to sign.
Selecting this option will automatically fill the Senior Rater's
Information
Senior Rater must explain a No entry in Part Ve.
OK
View Form
Previous
Next
Page 3 of 3
o his performance as First Sergeant has been outstanding
Master Sergeants in his company
o Soldier not available for signature
1 2 3 Successful
4 Fair
5 Poor
d. SENIOR RATER. Overall potential for promotion and/or service in positions of greater responsibility.
1 2 3 Superior
4 Fair
5 Poor

Bottom line:

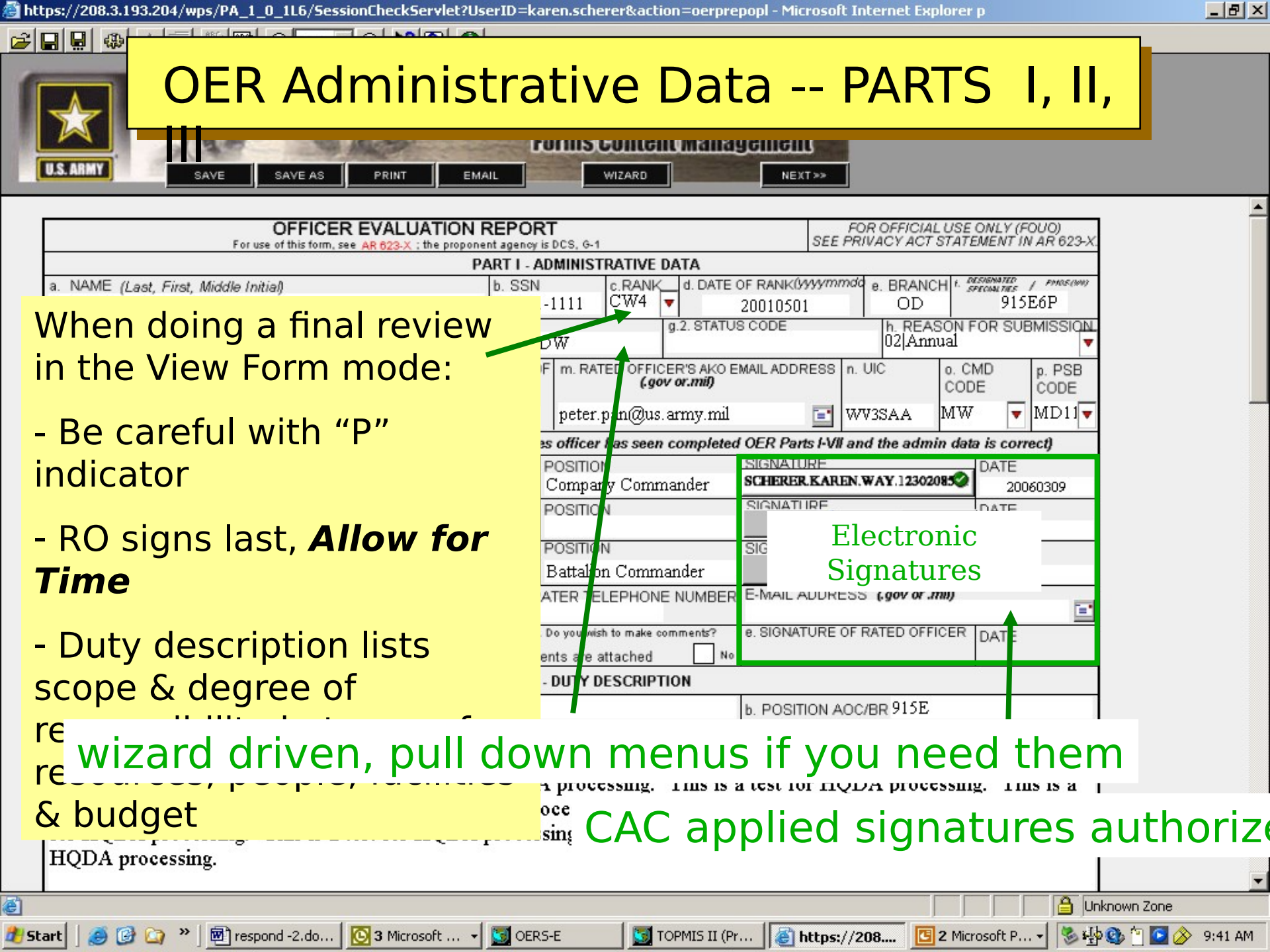
The rated Soldier is the only signature that can be missing from an evaluation.

The senior rater must put an explanation in his/her section.

On NCOER answer questions and type explanation (see diagram here.)

On OER answer questions and amend the answer (or rewrite) that the form produces (similar to diagram here.)

OER Administrative Data -- PARTS I, II, III

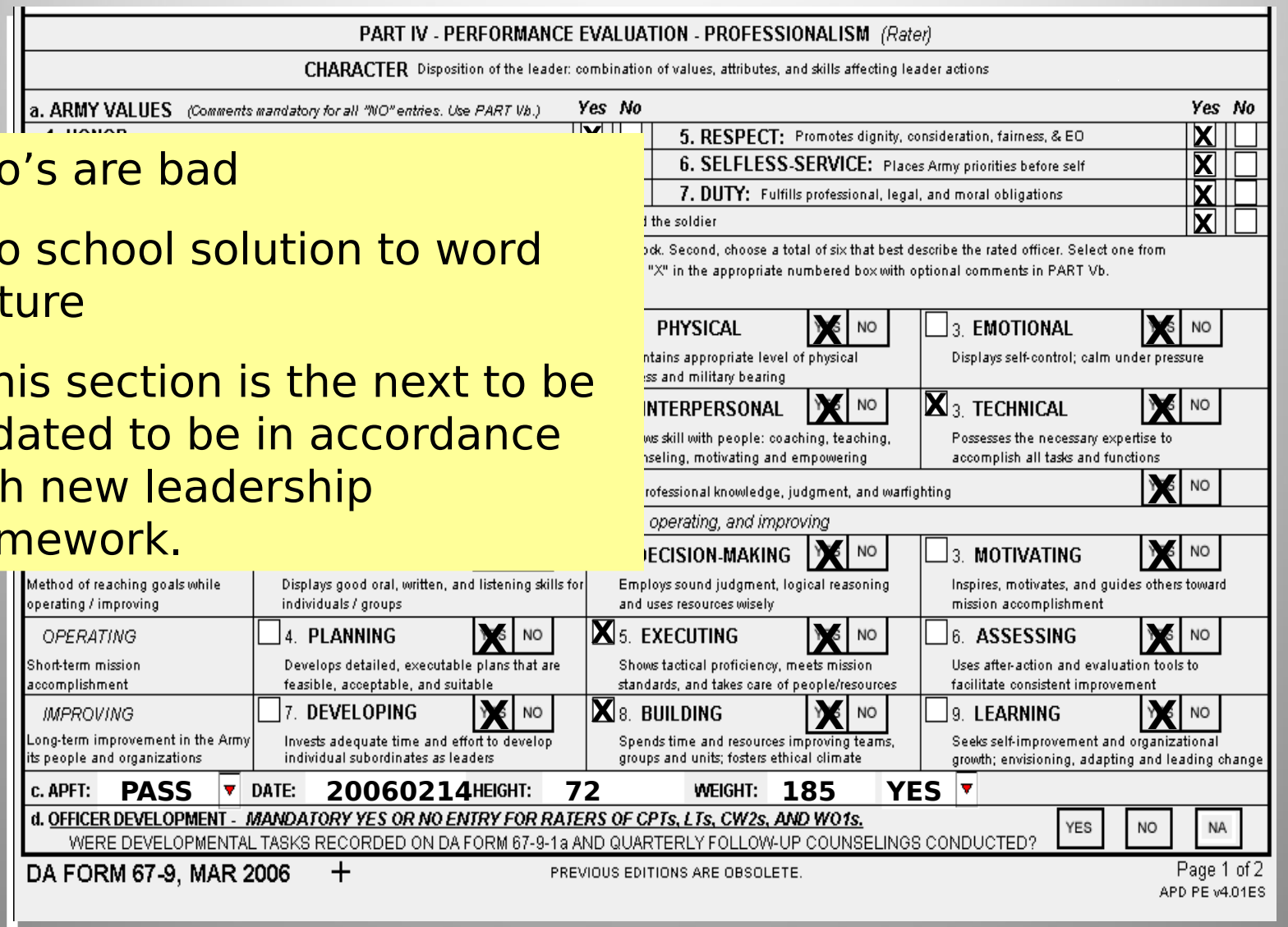


Professionalism – Part IV

- No's are bad

- No school solution to word picture

- This section is the next to be updated to be in accordance with new leadership framework.



PART IV - PERFORMANCE EVALUATION - PROFESSIONALISM *(Rater)*

CHARACTER Disposition of the leader: combination of values, attributes, and skills affecting leader actions

a. ARMY VALUES *(Comments mandatory for all "NO" entries. Use PART Vb.)* — Yes / No

5. RESPECT: Promotes dignity, consideration, fairness, & EO — Yes X
6. SELFLESS-SERVICE: Places Army priorities before self — Yes X
7. DUTY: Fulfills professional, legal, and moral obligations — Yes X
the soldier — Yes X

ock. Second, choose a total of six that best describe the rated officer. Select one from "X" in the appropriate numbered box with optional comments in PART Vb.

PHYSICAL — YES X / NO
ntains appropriate level of physical ss and military bearing

3. EMOTIONAL — YES X / NO
Displays self-control; calm under pressure

INTERPERSONAL — YES X / NO
ws skill with people: coaching, teaching, nseling, motivating and empowering

X 3. TECHNICAL — YES X / NO
Possesses the necessary expertise to accomplish all tasks and functions

rofessional knowledge, judgment, and warfighting — YES X / NO

operating, and improving

ECISION-MAKING — YES X / NO
Employs sound judgment, logical reasoning and uses resources wisely

3. MOTIVATING — YES X / NO
Inspires, motivates, and guides others toward mission accomplishment

Method of reaching goals while operating / improving	Displays good oral, written, and listening skills for individuals / groups	Employs sound judgment, logical reasoning and uses resources wisely	Inspires, motivates, and guides others toward mission accomplishment
OPERATING Short-term mission accomplishment	☐ 4. PLANNING YES X / NO — Develops detailed, executable plans that are feasible, acceptable, and suitable	X 5. EXECUTING YES X / NO — Shows tactical proficiency, meets mission standards, and takes care of people/resources	☐ 6. ASSESSING YES X / NO — Uses after-action and evaluation tools to facilitate consistent improvement
IMPROVING Long-term improvement in the Army its people and organizations	☐ 7. DEVELOPING YES X / NO — Invests adequate time and effort to develop individual subordinates as leaders	X 8. BUILDING YES X / NO — Spends time and resources improving teams, groups and units; fosters ethical climate	☐ 9. LEARNING YES X / NO — Seeks self-improvement and organizational growth; envisioning, adapting and leading change

c. APFT: PASS DATE: 20060214 HEIGHT: 72 WEIGHT: 185 YES

d. OFFICER DEVELOPMENT - *MANDATORY YES OR NO ENTRY FOR RATERS OF CPTs, LTs, CW2s, AND WO1s.*
WERE DEVELOPMENTAL TASKS RECORDED ON DA FORM 67-9-1a AND QUARTERLY FOLLOW-UP COUNSELINGS CONDUCTED? YES / NO / NA

DA FORM 67-9, MAR 2006 + PREVIOUS EDITIONS ARE OBSOLETE. Page 1 of 2
APD PE v4.01ES

Rater and Intermediate Rater Evaluations - Parts V & VI

Va

PART V - PERFORMANCE AND POTENTIAL EVALUATION *(Rater)*

a. EVALUATE THE RATED OFFICER'S PERFORMANCE DURING THE RATING PERIOD AND HIS/HER POTENTIAL FOR PROMOTION

☐ OUTSTANDING PERFORMANCE, MUST PROMOTE ☐ SATISFACTORY PERFORMANCE, PROMOTE ☐ UNSATISFACTORY PERFORMANCE, DO NOT PROMOTE ☐ OTHER *(Explain)*

b. COMMENT ON SPECIFIC ASPECTS OF THE PERFORMANCE, REFER TO PART III, DA FORM 67-9 AND PART IVa, b, AND PART Vb, DA FORM 67-9-1.

Vb – Rater Narrative on Performance

c. COMMENT ON POTENTIAL FOR PROMOTION.

Vc – Rater Narrative on Potential

Rater's narrative separated into distinct sections.

d. IDENTIFY ANY UNIQUE PROFESSIONAL SKILLS OR AREAS OF EXPERTISE OF VALUE TO THE ARMY THAT THIS OFFICER POSSESSES. FOR ARMY COMPETITIVE CATEGORY CPT ALSO INDICATE A POTENTIAL CAREER FIELD FOR FUTURE SERVICE. (or: FUNCTIONAL CATEGORY, form dependant)

Vd

Optional: Unique Professional Skills/Expertise

Mandatory for ACC CPT only: Functional Category Recommendation (Would serve Army best

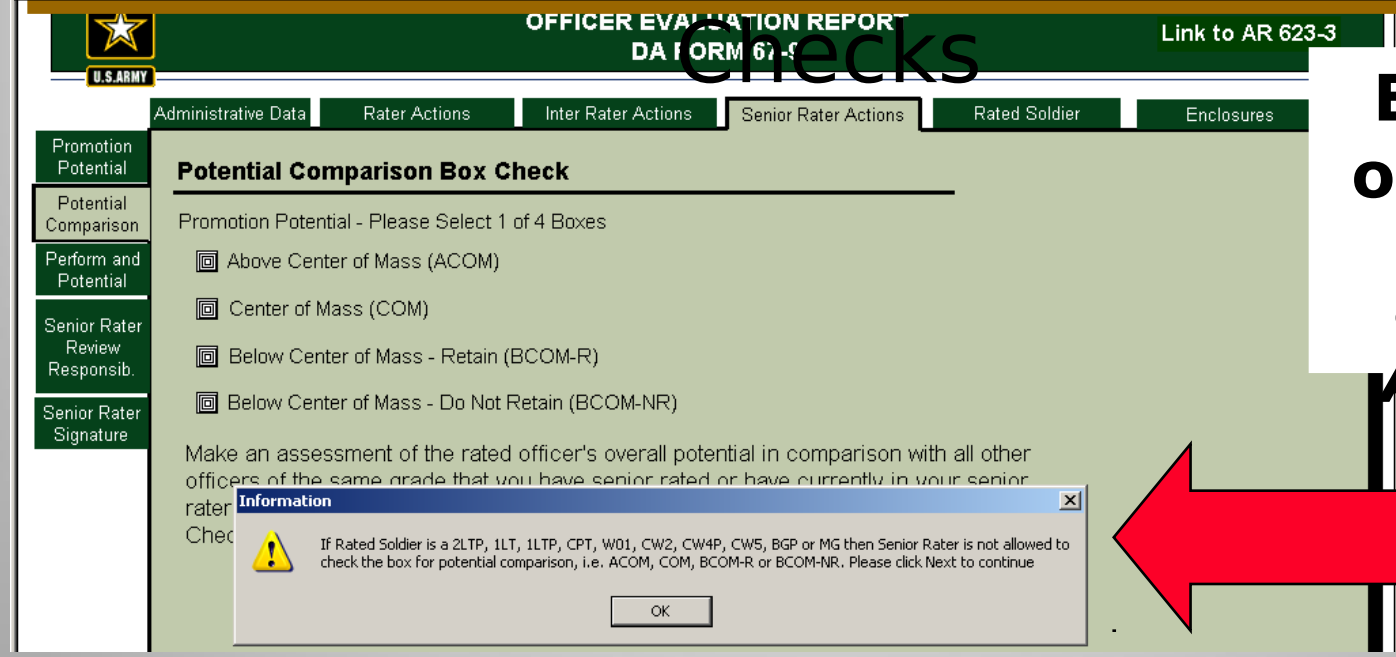
PART VI - INTERMEDIATE RATER

termediate Rater Narrative

If a Intermediate Rated is NOT used ensure there is no space in PART VI. Space is understood as text and report will not upload into AKO Forms.

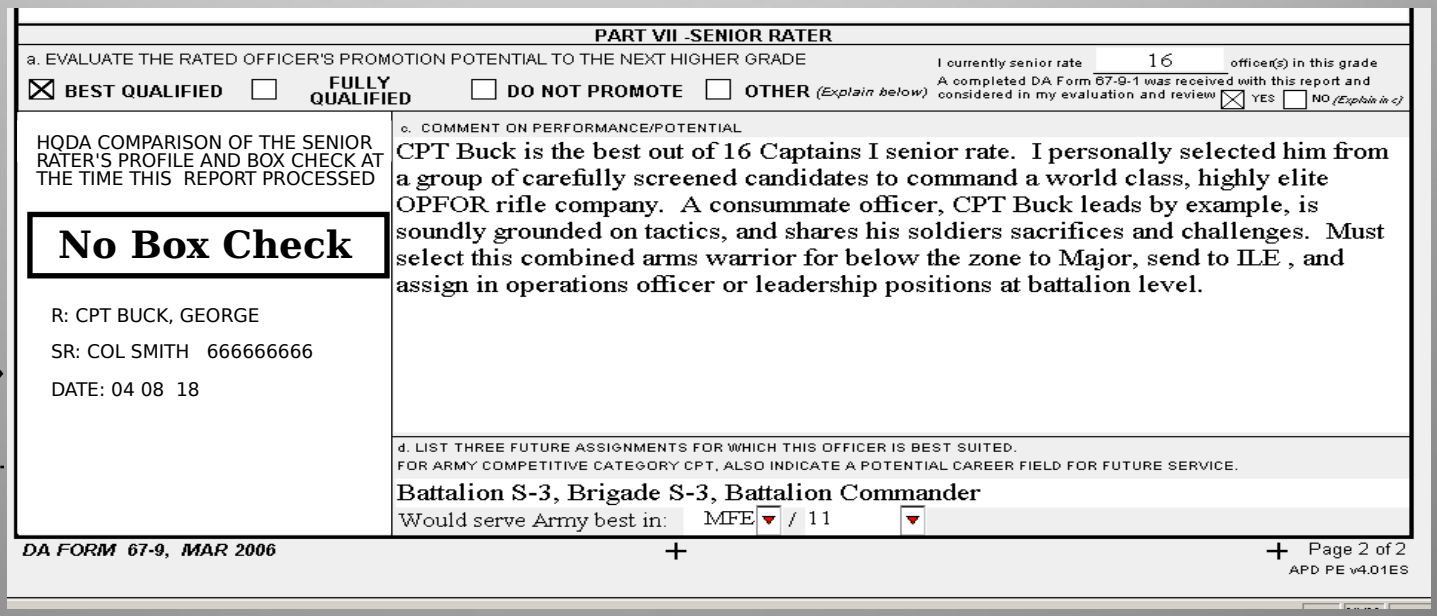
In wizard OER: pull down menus will only show for CPT reports.

SR Section: OER without Box Checks

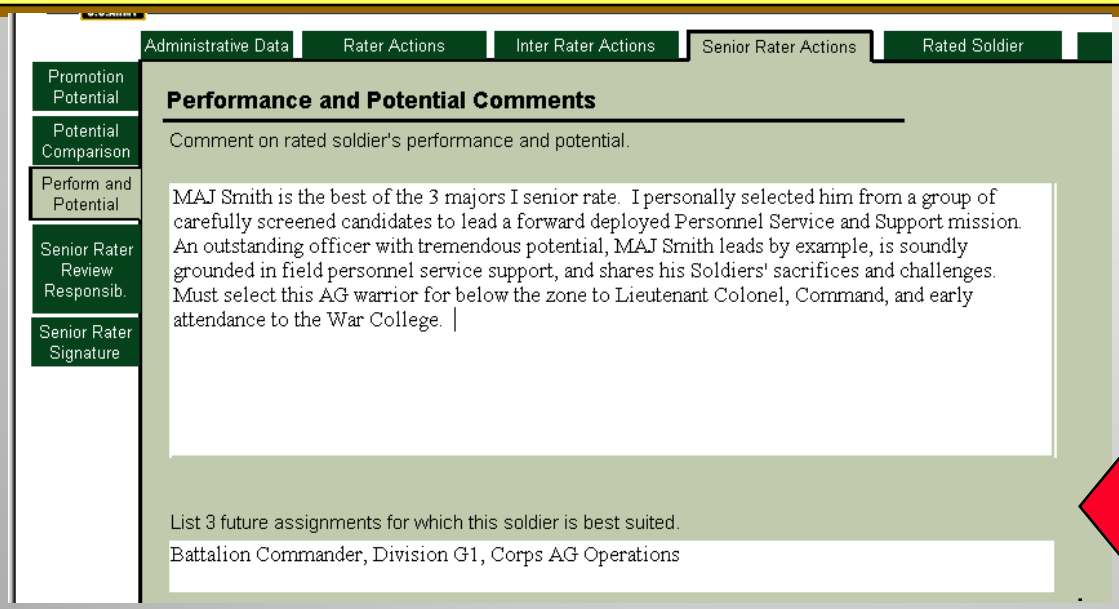

OFFICER EVALUATION REPORT
DA FORM 67-9
Link to AR 623-3
Administrative Data
Rater Actions
Inter Rater Actions
Senior Rater Actions
Rated Soldier
Enclosures
Promotion Potential
Potential Comparison
Perform and Potential
Senior Rater Review Responsib.
Senior Rater Signature
Potential Comparison Box Check
Promotion Potential - Please Select 1 of 4 Boxes
Above Center of Mass (ACOM)
Center of Mass (COM)
Below Center of Mass - Retain (BCOM-R)
Below Center of Mass - Do Not Retain (BCOM-NR)
Make an assessment of the rated officer's overall potential in comparison with all other
Information
If Rated Soldier is a 2LTP, 1LT, 1LTP, CPT, W01, CW2, CW4P, CW5, BGP or MG then Senior Rater is not allowed to check the box for potential comparison, i.e. ACOM, COM, BCOM-R or BCOM-NR. Please click Next to continue
OK

Example of Senior Rater Section *At Unit Level*

After HQDA Processing

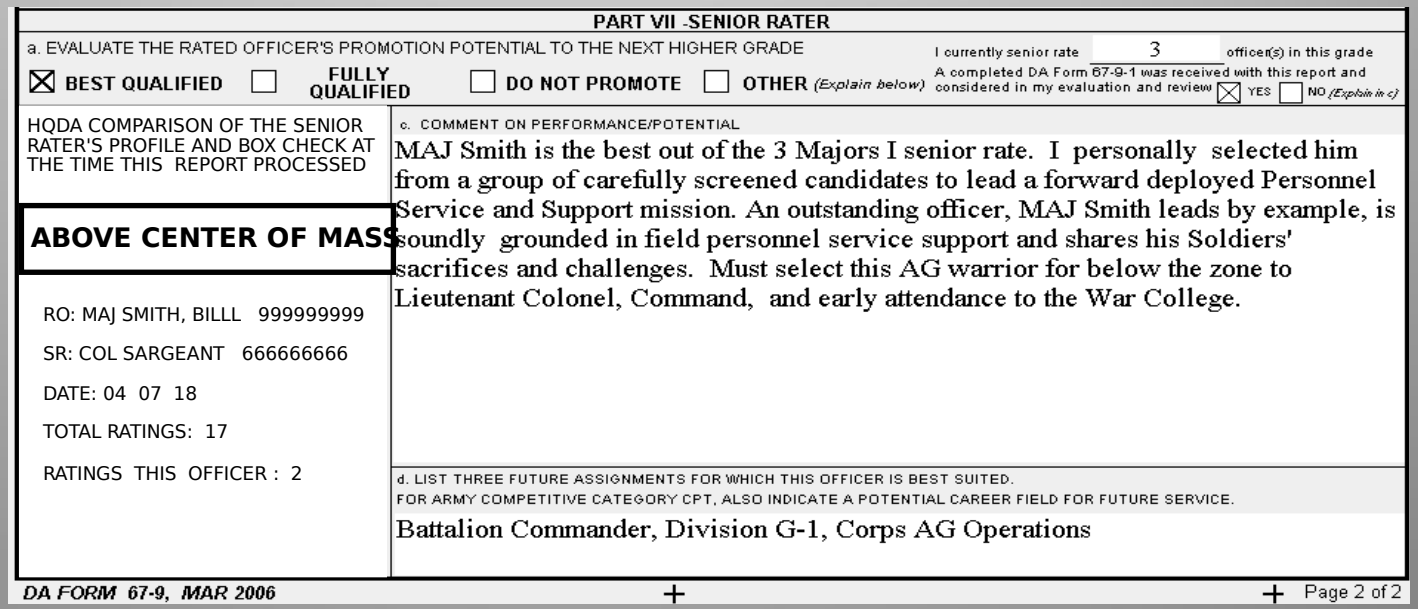

PART VII -SENIOR RATER
a. EVALUATE THE RATED OFFICER'S PROMOTION POTENTIAL TO THE NEXT HIGHER GRADE
I currently senior rate 16 officer(s) in this grade
BEST QUALIFIED
FULLY QUALIFIED
DO NOT PROMOTE
OTHER (Explain below)
A completed DA Form 67-9-1 was received with this report and considered in my evaluation and review YES NO
HQDA COMPARISON OF THE SENIOR RATER'S PROFILE AND BOX CHECK AT THE TIME THIS REPORT PROCESSED
No Box Check
R: CPT BUCK, GEORGE
SR: COL SMITH 666666666
DATE: 04 08 18
c. COMMENT ON PERFORMANCE/POTENTIAL
CPT Buck is the best out of 16 Captains I senior rate. I personally selected him from a group of carefully screened candidates to command a world class, highly elite OPFOR rifle company. A consummate officer, CPT Buck leads by example, is soundly grounded on tactics, and shares his soldiers sacrifices and challenges. Must select this combined arms warrior for below the zone to Major, send to ILE , and assign in operations officer or leadership positions at battalion level.
d. LIST THREE FUTURE ASSIGNMENTS FOR WHICH THIS OFFICER IS BEST SUITED.
FOR ARMY COMPETITIVE CATEGORY CPT, ALSO INDICATE A POTENTIAL CAREER FIELD FOR FUTURE SERVICE.
Battalion S-3, Brigade S-3, Battalion Commander
Would serve Army best in: MFE / 11
DA FORM 67-9, MAR 2006
Page 2 of 2
APD PE v4.01ES

SR Section: Managed Profile – How it work


Administrative Data
Rater Actions
Inter Rater Actions
Senior Rater Actions
Rated Soldier
Promotion Potential
Potential Comparison
Perform and Potential
Senior Rater Review Responsib.
Senior Rater Signature
Performance and Potential Comments
Comment on rated soldier's performance and potential.
MAJ Smith is the best of the 3 majors I senior rate. I personally selected him from a group of carefully screened candidates to lead a forward deployed Personnel Service and Support mission. An outstanding officer with tremendous potential, MAJ Smith leads by example, is soundly grounded in field personnel service support, and shares his Soldiers' sacrifices and challenges. Must select this AG warrior for below the zone to Lieutenant Colonel, Command, and early attendance to the War College.
List 3 future assignments for which this soldier is best suited.
Battalion Commander, Division G1, Corps AG Operations

Senior Rater section – at unit level

Processed at ***HQDA***


PART VII -SENIOR RATER
a. EVALUATE THE RATED OFFICER'S PROMOTION POTENTIAL TO THE NEXT HIGHER GRADE
I currently senior rate 3 officer(s) in this grade
BEST QUALIFIED
FULLY QUALIFIED
DO NOT PROMOTE
OTHER (Explain below)
A completed DA Form 67-9-1 was received with this report and considered in my evaluation and review YES NO (Explain in c)
HQDA COMPARISON OF THE SENIOR RATER'S PROFILE AND BOX CHECK AT THE TIME THIS REPORT PROCESSED
ABOVE CENTER OF MASS
RO: MAJ SMITH, BILLL 999999999
SR: COL SARGEANT 666666666
DATE: 04 07 18
TOTAL RATINGS: 17
RATINGS THIS OFFICER : 2
c. COMMENT ON PERFORMANCE/POTENTIAL
MAJ Smith is the best out of the 3 Majors I senior rate. I personally selected him from a group of carefully screened candidates to lead a forward deployed Personnel Service and Support mission. An outstanding officer, MAJ Smith leads by example, is soundly grounded in field personnel service support and shares his Soldiers' sacrifices and challenges. Must select this AG warrior for below the zone to Lieutenant Colonel, Command, and early attendance to the War College.
d. LIST THREE FUTURE ASSIGNMENTS FOR WHICH THIS OFFICER IS BEST SUITED.
FOR ARMY COMPETITIVE CATEGORY CPT, ALSO INDICATE A POTENTIAL CAREER FIELD FOR FUTURE SERVICE.
Battalion Commander, Division G-1, Corps AG Operations
DA FORM 67-9, MAR 2006
Page 2 of 2

Managed Profile Technique
(for those receiving a box check)

Rule #1:

SENIOR RATER BOX CHECK

b. POTENTIAL COMPARED WITH OFFICERS SENIOR RATED IN SAME GRADE (OVERPRINTED BY DA)

- ☐ ABOVE CENTER OF MASS (Less than 50% in top box; Center of Mass if 50% or more in top box)
- ☒ CENTER OF MASS
- ☐ BELOW CENTER OF MASS RETAIN
- ☐ BELOW CENTER OF MASS DO NOT RETAIN

LABEL

HQDA COMPARISON OF THE SENIOR RATER'S PROFILE AND BOX CHECK AT THE TIME THIS REPORT PROCESSED

CENTER OF MASS

RO: COL BUCK, GEORGE 999999999
SR: LTG SMITH 666666666
DATE: 98 07 18
TOTAL RATINGS: 20
RATINGS THIS OFFICER : 2

Rule #2:

SENIOR RATER BOX CHECK

b. POTENTIAL COMPARED WITH OFFICERS SENIOR RATED IN SAME GRADE (OVERPRINTED BY DA)

- ☐ ABOVE CENTER OF MASS (Less than 50% in top box; Center of Mass if 50% or more in top box)
- ☐ CENTER OF MASS
- ☒ BELOW CENTER OF MASS RETAIN
- ☐ BELOW CENTER OF MASS DO NOT RETAIN

LABEL

HQDA COMPARISON OF THE SENIOR RATER'S PROFILE AND BOX CHECK AT THE TIME THIS REPORT PROCESSED

BELOW CENTER OF MASS RETAIN

RO: COL BUCK, GEORGE 999999999
SR: LTG SMITH 666666666
DATE: 98 07 18
TOTAL RATINGS: 20
RATINGS THIS OFFICER : 2

Regardless of profil

Managed Profile Technique

Top block check gets ONE of two labels...

At receipt at DA

PROFILE HISTORY

3 17 0 0 20

ACOM, COM, BCOM 1&2, TOTAL

b. POTENTIAL COMPARED WITH OFFICERS SENIOR RATED IN SAME GRADE (OVERPRINTED BY DA)

- [x] ABOVE CENTER OF MASS (Less than 50% in top box; Center of Mass if 50% or more in top box)
- [ ] CENTER OF MASS
- [ ] BELOW CENTER OF MASS RETAIN
- [ ] BELOW CENTER OF MASS DO NOT RETAIN

HQDA COMPARISON OF THE SENIOR RATER'S PROFILE AND BOX CHECK AT THE TIME THIS REPORT PROCESSED

ABOVE CENTER OF MASS

RO: COL BUCK, GEORGE 999999999

SR: LTG SMITH 666666666

DATE: 96 07 18

TOTAL RATINGS: 20

RATINGS THIS OFFICER : 2

Rule #3:

Labeled "above center of mass" *when...*

- **Profile is less than 50% in top block**
- **Board sees only label and narrative**

At receipt at DA

PROFILE HISTORY IS:

10 10 0 0 20

ACOM, COM, BCOM 1&2, TOTAL

HQDA COMPARISON OF THE SENIOR RATER'S PROFILE AND BOX CHECK AT THE TIME THIS REPORT PROCESSED

CENTER OF MASS

RO: COL BUCK, GEORGE 999999999

SR: LTG SMITH 666666666

DATE: 96 07 18

TOTAL RATINGS: 20

RATINGS THIS OFFICER : 2

Rule #4: - Misfire -

Labeled "center of mass" *when...*

- **Profile is equal to or more than 50% in top block**
- **Board sees only label and**

Completed Senior Rater Section

PART VI - SENIOR RATER

a. EVALUATE THE RATED OFFICER'S PROMOTION POTENTIAL TO THE NEXT HIGHER GRADE

I currently senior rate 16 officer(s) in this grade

☒ BEST QUALIFIED ☐ FULLY QUALIFIED ☐ DO NOT PROMOTE ☐ OTHER *(Explain below)*

A completed DA Form 67-9-1 was received with this report and considered in my evaluation and review ☒ YES ☐ NO *(Explain in c)*

HQDA COMPARISON OF THE SENIOR RATER'S PROFILE AND BOX CHECK AT THE TIME THIS REPORT PROCESSED

CENTER OF MASS

RO: MAJ BUCK, GEORGE 999999999
SR: COL SMITH 666666666
DATE: 98 07 18
TOTAL RATINGS: 17
RATINGS THIS OFFICER : 1

c. COMMENT ON PERFORMANCE/POTENTIAL

MAJ Buck is one of the best Majors I senior rate. I personally selected him from a group of carefully screened candidates as my XO. A consummate officer, MAJ Buck leads by example, is soundly grounded on tactics, and shares his Soldiers' sacrifices and challenges. Send this joint operations experienced warrior to ILE and assign in operations positions or leadership positions at battalion or brigade level. He should command.

d. LIST THREE FUTURE ASSIGNMENTS FOR WHICH THIS OFFICER IS BEST SUITED.
FOR ARMY COMPETITIVE CATEGORY CPT, ALSO INDICATE A POTENTIAL CAREER FIELD FOR FUTURE SERVICE.

Division Maintenance Officer, TRADOC instructor, CASCOM Doctrine writer

Reinforcing Rules:

- **First single top box at a given grade will generate an ACOM label at DA, regardless of profile** (of the first four OERs in a grade, by component, any one, but only one, can be an ACOM.)
- **Cannot mention box check in the narrative**
- **Restarts by grade, with SR's permission, after 3 reports & a documented misfire in that grade have**

What's a Misfire?

Definition: An OER with an ACOM box check that receives a COM DA Label because the senior rater profile (50% or greater) does not support an ACOM rating.

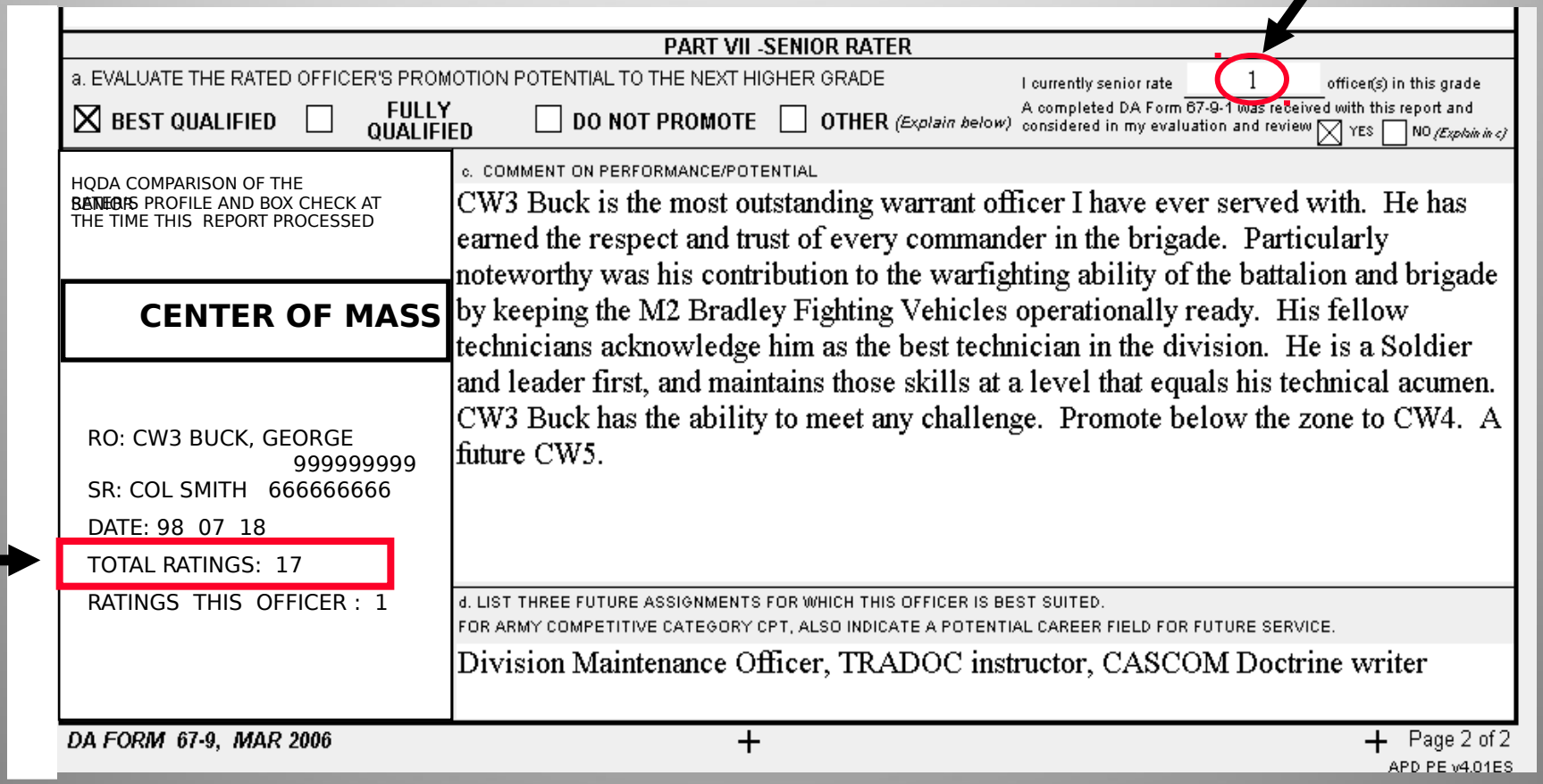
- Mechanism to prevent - Senior Rater Contact Program. Once OERs are processed, a daily Potential Misfire roster IDs problems. The SR is contacted and given options:
  - Submit COM OER(s) to support ACOM / and resequencing.
  - Withdraw / return potential misfire OER.
  - Give authorization to change box check to COM (SR should notify rated officer).
  - Officially misfire the report - What happens?
    - – Rated officer receives a COM DA Label.
    - – ACOM counts on senior rater profile, further limiting SR ability to give future ACOMs.
    - – SR receives a Discipline MEMO thru their rating chain.
- Bottom line:
  - Know / manage your profile.
  - We will help and work with you.

Small Population / Small Profile

SELECTION BOARD INSTRUCTIONS:

(1) Check Box in VIIa - same grade in population ***(3 OR LESS = Small Population)***

(2) Check DA label: "Total Ratings" ***(5 or less = immature profile)***



PART VII -SENIOR RATER

a. EVALUATE THE RATED OFFICER'S PROMOTION POTENTIAL TO THE NEXT HIGHER GRADE

I currently senior rate 1 officer(s) in this grade

☒ BEST QUALIFIED ☐ FULLY QUALIFIED ☐ DO NOT PROMOTE ☐ OTHER (Explain below)

A completed DA Form 67-9-1 was received with this report and considered in my evaluation and review ☒ YES ☐ NO (Explain in c)

HQDA COMPARISON OF THE RATER'S PROFILE AND BOX CHECK AT THE TIME THIS REPORT PROCESSED

CENTER OF MASS

RO: CW3 BUCK, GEORGE 999999999

SR: COL SMITH 666666666

DATE: 98 07 18

TOTAL RATINGS: 17

RATINGS THIS OFFICER : 1

c. COMMENT ON PERFORMANCE/POTENTIAL

CW3 Buck is the most outstanding warrant officer I have ever served with. He has earned the respect and trust of every commander in the brigade. Particularly noteworthy was his contribution to the warfighting ability of the battalion and brigade by keeping the M2 Bradley Fighting Vehicles operationally ready. His fellow technicians acknowledge him as the best technician in the division. He is a Soldier and leader first, and maintains those skills at a level that equals his technical acumen. CW3 Buck has the ability to meet any challenge. Promote below the zone to CW4. A future CW5.

d. LIST THREE FUTURE ASSIGNMENTS FOR WHICH THIS OFFICER IS BEST SUITED.
FOR ARMY COMPETITIVE CATEGORY CPT, ALSO INDICATE A POTENTIAL CAREER FIELD FOR FUTURE SERVICE.

Division Maintenance Officer, TRADOC instructor, CASCOM Doctrine writer

DA FORM 67-9, MAR 2006 Page 2 of 2

APD PE v4.01ES

Senior Rater Profile Report: DA FORM 67-9-2

SENIOR RATER PROFILE REPORT
OFFICER EVALUATION REPORTING SYSTEM
FOR USE OF THIS FORM, SEE AR 623-105; PROPONENT AGENCY IS ODCSPER

A. NAME	B. SSN	C. RANK	D. DATE OF REPORT

	CURRENT OER PROFILE					PROFILE HISTORY		
	ACOM COM	COM	BCOM RETAIN	BCOM DO NOT RETAIN	Total Ratings	Total Ratings	1st Block COM	% Total 1st Block
MG	*Do Not Receive block VIIb. Box Check*							
BG								
COL								
LTC								
MAJ								
CPT	*Do Not Receive block VIIb. Box Check*							
1LT	*Do Not Receive block VIIb. Box Check*							
2LT	*Do Not Receive block VIIb. Box Check*							
CW5	*Do Not Receive block VIIb. Box Check*							
CW4								
CW3								
CW2	*Do Not Receive block VIIb. Box Check*							
WO1	*Do Not Receive block VIIb. Box Check*							

DA FORM 67-9-2 1 OCT 97

A senior rater profile is separated by rated officer rank.
Consolidation occurred 22 May 07.

Available to senior raters:
Online with AKO Logon:
-HRC front page: www.hrc.army.mil
-AKO Self Service options, My Personnel

Email: tapcmse@conus.army.mil
Telephone: (502) 983-9019 (DSN 983)

Online profile includes:
-Evaluation Timeliness Report
-Matrix of profile numbers (seen here)

Develop a Senior Rater Rating Plan

Name	Position	# of OERs previously received in current position (include previous SR's OERS)	Last OER/Type/Rating *Codes:* Change of Rater - CR, Change of Duty - CD, PCS - PCS, Annual - AN, Com the Record -CTR, SR Option - SO, Relief for Cause - RFC *Ratings* ACOM/COM/BCOM	Projected OER Date of next OER	Projected Type Type of report (Use Codes)	Projected Rating How I would rate this officer if I rated everyone today <50% in ACOM (Adjust as events dictate)	OER to DA (90days) Date report needs to be at DA (except board reports need to get to DA per board message)	Subsequent OER Will the officer receive more reports from	Cohort YG	Next Board/Date Next selection board the officer would be eligible for	Projected Departure/ Promotion
Black, A	BN XO 1/35 Inf	1	Jun 04/CR/COM	Jun-05	AN	COM	Sep-05				Nov-06
Smith,D	BN S3 1/35 Inf	1	Jun 04/CR/ACOM	Dec-05	PCS	ACOM	Mar-05				Dec-06
Jones, T	BN Cdr 1/35 Inf	0	Jun 04/CR/COM	Jun-05	AN	ACOM	Sep-05				Jun-06
Davis, R	BN XO 1/36 Inf	0	Jun 04/CR/COM	May-05	CD	COM	Aug-05				Jun-05
Pike, M	BN S3 1/36Inf	0	Jun 04/CR/COM	Jun-05	AN	ACOM	Sep-05				May-06
Bass, S	BN Cdr 1/36 Inf	2	July 04/CD/COM								Aug-06
Doe, J	Bde S-1	1	Aug 04/PCS/ACOM								Aug-07
Buck, J	Bde CM Off	0	Sep04 /CR/COM	Sep-05	AN	COM	Dec-05				Jun-06
Fawn, B	Bde S-3	1	Sep 04/CR/ACOM	Apr-99	PCS	ACOM	Jul-05				Apr-06
Rockfish, A	BN Cdr Support	0	Jun 04/AN/COM	Jun-05	CD	COM	Sep-04				Jan-06

Example

Note: Promotable Officers serving in positions authorized the promotable grade will be profiled at the promotable grade if listed as (P)

This is on the OERS Home Page - Managin
Rater Profile

Any matrix that lists officers by rank along with some other helpful information will help Senior Raters (& their HR managers) to anticipate the next OER will help Senior Rater's manage and implement their rating

Understanding how a SR Profile adds new OER:

Example for 1 senior rater (SR), one grade of rated officer

Instructional Notes	Date of Receipt	THRU Date	Box Check	Label	# ACOM	# COM	# BCOM-R	# BCOM -DNR	Total #	ACOM %
Of first 4 OER in a grade, SR may use only one, but any one, ACOM. Many SR use none.	Existing profile from previous position/from Profile. →				1	3	0	0	4	25%
Profile adds based on OER box check.	1Jan08	1Dec07	COM	COM	1	4	0	0	5	20%
Label is determined by comparison of OER box check with profile. An ACOM box check supported by profile is ACOM label.	15Jan08	15Dec07	ACOM	ACOM	2	4	0	0	6	33%
Profile is based on Receipt not THRU date.	1Feb08	3Feb06	ACOM	ACOM	3	4	0	0	7	42.8 %
Batch Processing:	15Feb08	15Dec07	COM	COM	3	6	1	0	10	30%
Adds box check from OER with same receipt date.	15Feb08	15Dec07	COM	COM	3	6	1	0	10	30%
All get same profile.	15Feb08	15Dec07	BCOMR	BCOMR	3	6	1	0	10	30%
Potential Misfire:	16Feb08	3Jan08	ACOM	ACOM	6	6	1	0	13	46.2 %
DEFN: ACOM box check not supported by profile (50% or more)	16Feb08	2Dec07	ACOM	ACOM	6	6	1	0	13	46.2 %
Result: label reads COM, profile builds in ACOM.	16Feb08	5Jan08	ACOM	ACOM	6	6	1	0	13	46.2 %

Understanding the order of eval processing

Example for 1 senior rater (SR), many grades of rated Soldiers

Instructional Notes	Date of Receipt at HRC	RS Grade	THRU Date	RO in near term board?	Board MSG Received NLT Date	IWRS Status	HRC complete in this order:
Evals process in order to allow all to make boards and not mess up SR profile (for OER). Some may wait. HRC works fast as they can.	1May08	CW2	1Dec07	No		WORKING	
	2May08	SGM	15Dec07	Not at this time		COMPLETE	--NA--
While not destined for a near term board, this LTC OER (& all after it) has to profile/complete prior to other LTC OER that are.	3Jun08	LTC	15Dec07			WORKING	**1**
OER will complete and be placed in OMPF & pulled automatically into board file. Received prior to date listed as suspense to HRC.	1July08	LTC	25Dec07	3SEP08	22Aug08	WORKING	**2**
	10Jul08	MAJ	1Jul08			WORKING	
	15Jul08	CW3	1Jul08			WORKING	
Processes by receipt not THRU date.	30Jul08	LTC	1Dec07			WORKING	**3**
	2Aug08	MAJ	1Jul08			WORKING	
	18Aug08	CW3	1Jul08			WORKING	
OER will complete and be placed in OMPF to be pulled automatically into board file. Action might be 1-2 days after MBF closes but will be BEFORE voting starts. Dates are set to give HRC time to complete this mission.	22Aug08	LTC	5Jun07	3SEP08	22Aug08	WORKING	**4**

NCO-ER

Updates / Initiatives

- Common Errors Today:
  - Gaps in reporting periods – watch, use online tools
  - Lack of or insufficient (non-specific) counseling
  - Weak bullets on ‘excellence’ or ‘needs improvement’

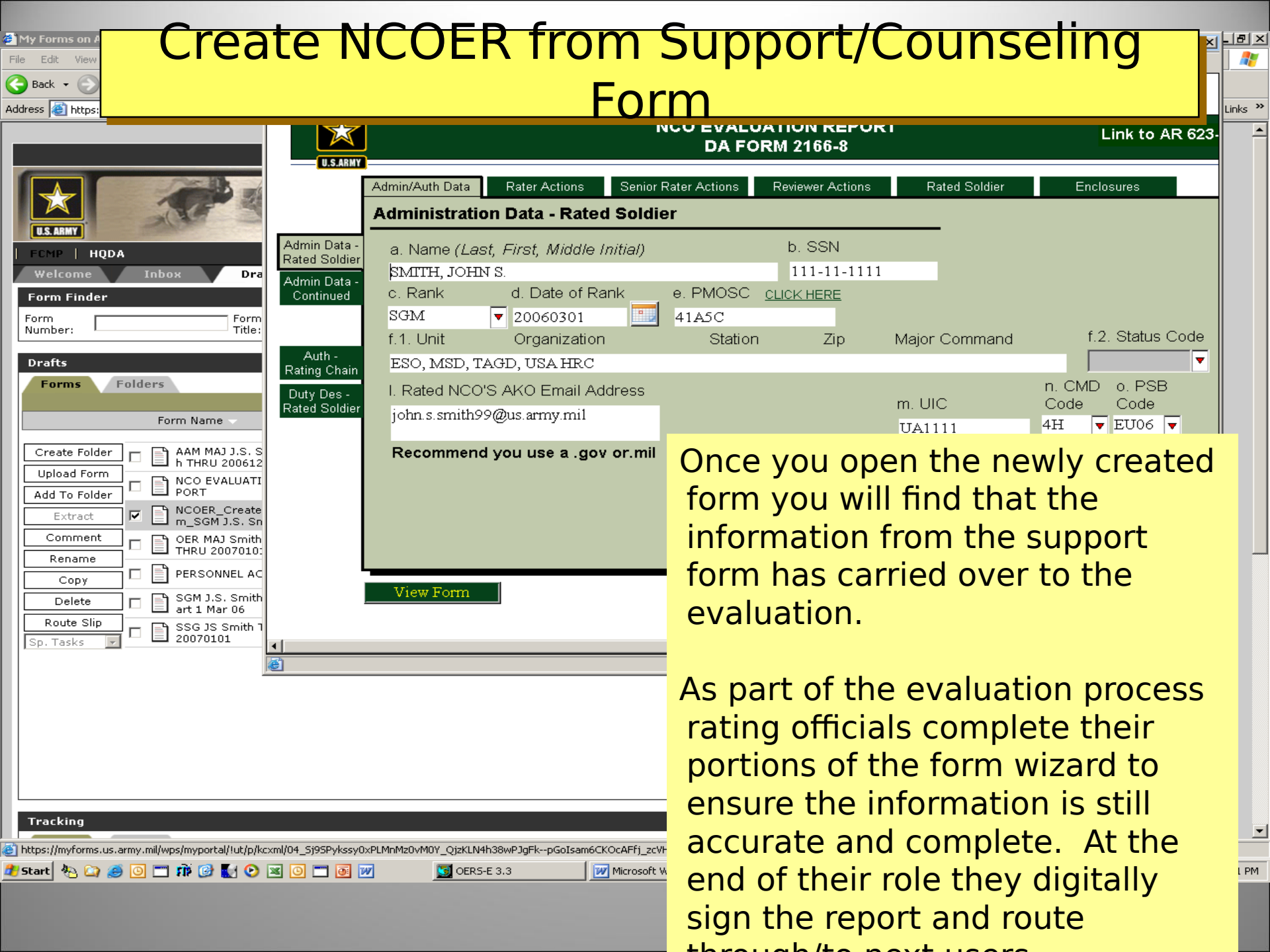
- Technological & administrative changes:
  - Electronic submission in AKO Forms
  - Paper submission address to Alexandria

    (except for ARNG NCOER which are sent to State/Territory POC)
  - IWRS provides NCOER information (except ARNG NCOER)
  - Timeliness Report in Online SR Profile working with NCOER info (will be reset to track evals after 1 Oct 08)
  - HQDA Process similar to OER now

Key NCOER System Components

- Rating scheme establishing rating officials
- NCOER Counseling & Support Form (DA Form 2166-8-1, dated Mar 06)
  - Mandatory face to face counseling (documented)
  - Conducted within first 30 days of rating period and quarterly thereafter
- NCOER (DA Form 2166-8, dtd Mar 06)
  - Duty description
  - Senior rater portion
- Developmental Counseling (DA Form 4856-E)
  - Not a requirement for submission of evaluations
  - Recommend it as requirement in your unit

Create NCOER from Support/Counseling Form



Once you open the newly created form you will find that the information from the support form has carried over to the evaluation.

As part of the evaluation process rating officials complete their portions of the form wizard to ensure the information is still accurate and complete. At the end of their role they digitally sign the report and route through/to next users

Sample NCO-ER (page 2)

RATED NCO'S NAME (Last, First, Middle Initial): CRACKLE, JIMMY D. | jimmy.crackle@ | SSN: 000-11-2222 | THRU DATE: 2002 02

PART IV (Rater) - VALUES/NCO RESPONSIBILITIES

Specific Bullet examples of "EXCELLENCE" or "NEEDS IMPROVEMENT" are mandatory.
Specific Bullet examples of "SUCCESS" are optional.

		EXCELLENCE (Exceeds std)	SUCCESS (Meets std)	NEEDS IMPROVEMENT (Some)	NEEDS IMPROVEMENT (Much)
b. COMPETENCE o Duty proficiency, MOS competency o Technical & tactical; knowledge, skills, and abilities o Sound judgment o Seeking self-improvement; always learning o Accomplishing tasks to the fullest capacity, committed to excellence	o meticulous monitoring of NCO-ERs resulted in zero late reports and 99.6% accuracy rate over a six month period o expertly handled in excess of 2400 personnel actions during this rating period and ensured prompt processing o provided superb personnel service support to over 1900 soldiers assigned to the brigade	X			
c. PHYSICAL FITNESS & MILITARY BEARING o Mental and physical toughness o Endurance and stamina to go the distance o Displaying confidence and enthusiasm; looks like a soldier	APFT: PASS 0110 — HEIGHT/WEIGHT: 69/163 YES o awarded the physical fitness badge for two consecutive APFTs o routinely worked in excess of 60 hours per week and maintained high morale and enthusiasm	X			
d. LEADERSHIP o Mission first o Genuine concern for soldiers o Instilling the spirit to achieve and win o Setting the example; Be, Know, Do	o mentored two soldiers to win Brigade Soldier of the Quarter honors o motivated and coached a previously substandard soldier to successfully pass the APFT and meet the weight standards o ensured soldiers were regularly counseled and earned their trust and confidence as a caring, compassionate leader	X			
e. TRAINING o Individual and team o Mission focused; performance oriented o Teaching soldiers how; common tasks, duty related skills o Sharing knowledge and experience to fight, survive and win	o personally planned and executed annual common task training and testing for all soldiers assigned to the brigade headquarters o outstanding training efforts resulted in 98.7% first-time 'GO' rate on the CTT within the headquarters o constantly trained soldiers on daily tasks and responsibilities, refused to settle for mediocrity		X		
f. RESPONSIBILITY & ACCOUNTABILITY o Care and maintenance of equipment/facilities o Soldier and equipment safety o Conservation of supplies and funds o Encouraging soldiers to learn and grow o Responsible for good, bad, right & wrong	o maintained accountability of office and automation equipment valued in excess of $800K with zero loss or damage o completely reorganized office area to better utilize allocated space and removed excess to create more professional office atmosphere o kept track of soldiers and always knew where they were		X		

PART V - OVERALL PERFORMANCE AND POTENTIAL

a. RATER. Overall potential for promotion and/or service in positions of greater responsibility.

AMONG THE BEST	FULLY CAPABLE	MARGINAL
X		

e. SENIOR RATER BULLET COMMENTS

o select in the secondary zone for promotion to Sergeant First Class

o out-performs most Master Sergeants

o unquestionably the best Staff Sergeant I have ever rated or senior rated

o an all-around superb performance by a top-notch NCO

o assign to tough, challenging assignments - he will excel

b. RATER. List 3 positions in which the rated NCO could best serve the Army at his/her current or next higher grade.

Service School Instructor
Personnel Supervisor
Protocol NCO

c. SENIOR RATER. Overall performance: X — 1 Successful, 2, 3, 4 Fair, 5 Poor

d. SENIOR RATER. Overall potential for promotion and/or service in positions of greater responsibility: X — 1 Superior, 2, 3, 4 Fair, 5 Poor

DA FORM 2166-8, OCT 2001 — USAPA V1.00

TIPS:

--Lead off with your strongest excellence bullet

--S/R focus on promotion, schools, assignments

Reviewer Responsibilities

- Overall caretaker of system (honest-broker)

-- Reviews reports to ensure consistency, accuracy, and fairness

-- Resolves discrepancies between rater and senior rater

-- If discrepancy can't be resolved after discussing with both rating officials, then reviewer nonconcurs and attaches memorandum

-- If rater and senior rater agree on evaluation but reviewer does not, then reviewer ‘may’ nonconcur but must clearly articulate reason for nonconcurrence (creates question of integrity in rating officials)

-- Army trusts rater and senior rater to be fair and accurate in rendering reports - reviewer’s role is not to provide a 3rd evaluation

NCO-ER Tips

- Ensure counseling is happening; spot check rater's checklist/record
- Best NCO receives 2 or 3 Excellence bullets, not 5-0 or 4-1 (success in PT)
- Justify Excellence Bullets - Tell the story …
- If you give a Success box check – must add bullet comment (s); can't leave it blank
- Ensure Junior Officers and NCOs know system
- Senior Rater Narrative - Focus on Performance + Potential
  - promotion, school and assignments
- Create Excellence Opportunities - Tell NCOs how to achieve excellence
- NCO-ER Quality Control - suggest using CSM
- OER's must be at HRC within 90 days from the thru date

Backup Slides

Bottom Line for Those Concerned

- **All evaluations submitted electronically to HRC in AKO Forms after 1 Apr 08 (except ARNG NCOER).**
- We accept ink signed evaluations when absolutely needed (what else would we do?) but it must be mailed in. Not emailed. No exceptions. Even for boards.
- **Deployed units have options (get copy of SOP and read it & meet standards).**
- HRC knows considered populations for HQDA level boards. Any evaluation in-house report will get completed in time for that board (assuming no major errors or profile problems). Get the evaluation to HRC by the board suspense date.
- If someone has good reason for completion (other than HRC board) tell us.
- **Being visible in IWRS is good. Working status is good. Errors show up in admin notes in IWRS. We can fix most by email from an authoritative source.**
- We do not mess up profiles by our processing order.
- We do not automatically process documented misfires.
- We do process “first eval in” first over all other duplicates that follow (even if you’ve changed them). We won’t know second eval is right one unless you tell us.
- We will take longer than expected to process when we run short of people, have heavy boards schedules, have other critical projects. See all other points above to answer the questions you get on this topic.

Common Questions & Answer Sources:

- **Where & how do I submit to HRC?** First - By AKO Forms. Second - If you have only paper copies, by mail to Alexandria address.

  (Cdr, USA HRC, ATTN: AHRC-PDV-ER, 200 Stovall St, Alexandria VA 22332)

- **Will my/his/her/their OER or NCOER be completed prior to the board?** Yes, if there are no major errors or profile problems and it is received by the "received no later than date" given in each board message.

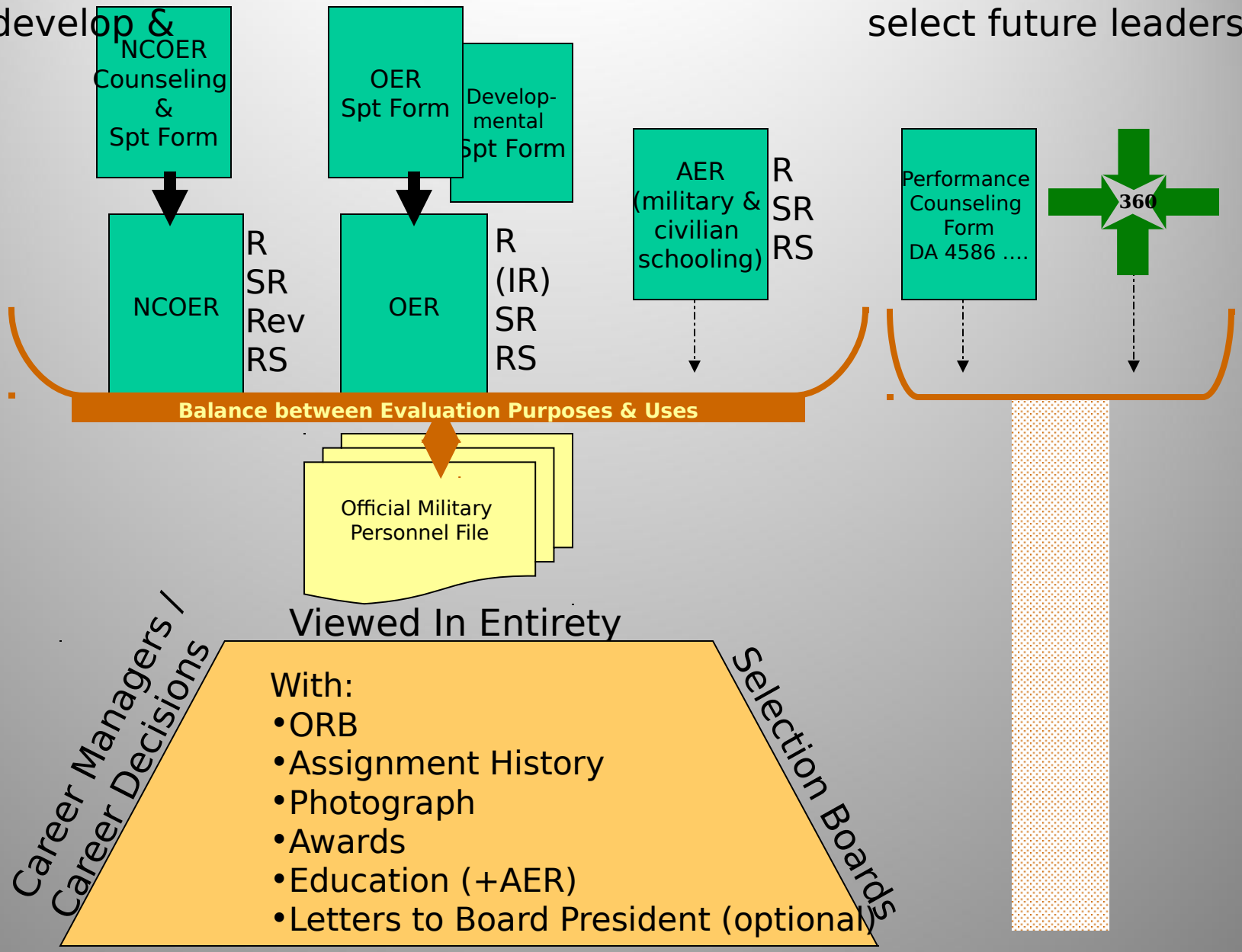
- **How long will does it take to process?** It depends. We get board reports completed in time for HQDA Level boards.

- **Is the OER or NCOER at HRC?** See IWRS & note load date. Evals received after this date are not visible yet. Working is good. Errors will reflect in IWRS reports.

- **How do I correct an error in an OER or NCOER?** We'd prefer you avoid most errors by using the wizards. Errors will be shown to you 1 of 2 ways:
  - a returned email and form through AKO Forms: Fix error and resubmit.
  - an error message visible in IWRS. Send us an email with the information needed to correct the error (be specific) and we'll work off most errors in-house.

Current System

Multiple, Army military counseling forms & evaluations used to develop & select future leaders.

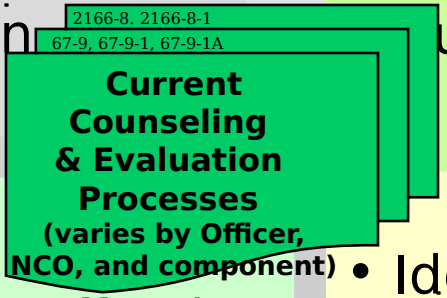


Leaders Need Ability To:

- Identify Army's best
- Counsel, mentor, & coach
- Capture specific skills & qualifications
- Practice good stewardship of the Army's Human Resources

Selection Boards Need:

- Ability to identify & select "best qualified" of a specific population based on specific, and changing, Army requirements



Soldiers Need:

- Leader counseling / effective feedback on performance & abilities
- Input into evaluation system
- Opportunity based on their specific skills, performance, and desires
- Job satisfaction

Managers Need:

- Identification & validation of job tasks, specific skills, and individual qualifications
- Knowledge of the expertise level within those skills
- Validation of training
- Correlation between evaluations and assignments

Section 7

Classified Reports

- Nothing yet behind the classified AKO. Working.
- Users still have their current processing and submission procedures available concurrent with the new electronic method.
- When going electronic, you can fill out as much as possible within the electronic version using a variety of methods; but, once printed, it stays printed and must be submitted in paper / hard copy.
- Once My Forms is on the SIPRNET users (after using the system to complete the report) will still need to submit to HQDA in hardcopy format as there can be no connection between SIPRNET and unclassified systems.